

Introducing InterServ

interserv®

InterServ is an independent Registered Investment Advisor that delivers investment management, co-fiduciary services and investment analysis reporting to retirement plan sponsors in partnership with their financial advisors.

What InterServ Does

InterServ brings value to the plan sponsor/advisor relationship by offering a unique investment process, prudent practices and quality investment analysis and recommendations. Other services include:

- Proprietary analysis of existing investment line-up, including InterScores™
- Customized Investment Policy Statement generation
- Asset allocation modeling recommendations
- Ongoing investment monitoring and reporting
- CEFEX-certified co-fiduciary service on applicable plans
- Periodic plan reviews with client's Investment Committee

How InterServ Works with Plan Sponsors and Financial Advisors

InterServ's professionals create customized solutions for plan intermediaries.

- Evaluate existing plans from an investment fiduciary standpoint
- Provide recommendations and integrate Investment Policy Statement
- Supply supporting materials and documentation and participate in quarterly investment committee meetings
- Deliver technologies that allow plan sponsors and advisors to access critical information
- Engage, communicate and educate financial advisors to enhance compliance with investment fiduciary processes
- Help to reduce risk for plan sponsors and financial advisors when InterServ serves as a co-fiduciary on plans

Why InterServ Now

The current regulatory, legislative and judicial environment is focused on providing assessment and disclosure of associated fees and conflicts of interest, while adhering to the highest standard of fiduciary practices when working with retirement plans. InterServ can help financial advisors and plan sponsors navigate these issues today while maintaining an eye toward the future.



InterServ is a CEFEX-certified RIA

Benefits of InterServ

For Financial Advisors

- Maximize time with clients and save resources by streamlining your business
- Protect client relationships
- Operate in a fee- or commission-based environment

For Plan Sponsors

- Utilize co-fiduciary services to help reduce investment fiduciary risk
- Make decisions through a process that can benefit participants
- Improve the governance of your plan and help empower committee members to serve effectively

For Participants

- Receive appropriate investment selections and monitoring for their plans

To learn more about InterServ and our certified fiduciary services:

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