



**ACCESSIBLE
AND AFFORDABLE
RETIREMENT PLAN COMPLIANCE**

OUR MISSION:

Our mission is to make retirement plan compliance accessible and affordable.

We do this by identifying the right services to deliver to your clients and building compliance resources from there. For member firms, our service is delivered through a turnkey compliance, practice management and training platform, backed by unlimited consulting to grow your business.

Home Office COMPLIANCE SOLUTIONS



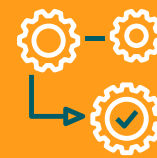
Solving retirement plan compliance with an all-in-one platform with unlimited consulting.

Advisors PRACTICE MANAGEMENT



Helping firms and advisors earn and keep more business.

Financial Institutions CUSTOM ENGAGEMENTS



From common to complex, expert advice for your organization.

COMPLIANCE SOLUTIONS

for your Home Office



PRI delivers banks, broker-dealers and RIAs a **configurable compliance framework**, coupled with **unlimited consulting**, to implement and maintain **profitable strategies** for serving retirement investors.

Reviewing Your Business Model for conflicts

Configuring Agreements, Disclosures and Compliance Policies

Customizing your platform with Training & Client-Facing Resources

Keeping you informed on New Laws, Regulations, and Best Practices

Promoting compliance for IRA Rollovers

PRI's
Retirement
Advantage
includes:

PRACTICE MANAGEMENT

Resources for your Advisors



Your advisors can access your firm's customized materials in one place. Stand out as an industry specialist with a full suite of business building resources, client-facing materials and industry-leading content on the same platform.

*PRI's Advisor
Resource Center
includes:*

PRI's Fiduciary Roadmap: G-MAP

Provider Search

Training & Education Resources + Service Documents in one place

Whitepapers & Thought Leadership for your practice

CUSTOM ENGAGEMENTS

for your Organization



At PRI, we recognize that not all challenges require the same solution. Our Compliance and Practice Management solutions solve the challenges our member firms face most commonly; however, we regularly help non-member firms to better understand industry trends, regulatory updates and advisor best practices.

From common to complex, expert advice for your financial institution.

Speaking & Workshops

Custom Training & Education

Risk Assessment & Risk Management Projects

Contact PRI to discuss how we can help your team meet its objectives.

 info@pension-resources.com

 913.236.9841

To schedule a demonstration or to learn more,
please contact **Pension Resource Institute:**



info@pension-resources.com



913-236-9841



ABOUT PENSION RESOURCE INSTITUTE

Founded in 2010, PRI has been making retirement plan compliance more accessible and affordable for banks, broker-dealers, and registered investment advisers.