

# FIDUCIARY WISE

— *meaningfully different* —

## Your Meaningfully Different ERISA 402(a) Named Fiduciary



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Fiduciary Wise is an independent professional Named Fiduciary that does not compete with other service providers.



### MEP's & PEP's

Fiduciary Wise has extensive experience in customizing Multiple Employer Plans and Pooled Employer Plans.



### Common Law of Trusts

Fiduciary Wise knows and applies the Common Law of Trusts to our practice as described in the Restatement Law of the Law Third Trusts.



### FORT

Fiduciary Wise created a tool, the Fiduciary Oversight of Responsibilities & Tasks (FORT), that we use annually to track the completion of over 70 fiduciary tasks.



### Fiduciary Wise Logo

Each side of the infinity triangle, as used in the Fiduciary Wise logo, is representative of quality, safety, and efficiency.



### Fiduciary Wise Brief

Fiduciary Wise supports our partners and service providers by offering nine training modules to help them understand ERISA and the Fiduciary Wise way.



### PAC Meetings

Fiduciary Wise is unique in our approach to documenting substantive procedural prudence through our Plan Administrative Committee (PAC) Meetings.



### DOL Final Rules

Fiduciary Wise not only keeps up with the Department of Labor, but we follow the guidance in the latest rulings 2020 & 2022 Final Rules.