



## Greenlight Retirement Plan Consultants, LLC

### **Introduction**

Greenlight Retirement Plan Consultants, LLC (“GRPC”) is an independent consulting firm dedicated to advising retirement plan fiduciaries.

Our goal is to help fiduciaries dramatically reduce the amount of time they need to spend on investment related responsibilities. We focus on improving the quality of investment options, providing critical analysis and documentation, and reducing the overall cost of the plan.

### **Who We Are**

GRPC was founded in 2018 by retirement plan investment expert Ian Green. Ian is a CFA charter holder and a Subject Matter Expert (SME) in the field of retirement plan cost analysis and mutual fund investment due diligence.

As the former Director of Investment Strategies at Voya Financial’s Institutional Client Services Group, he has over 15 years of experience creating and analyzing retirement plan investment lineups / fund menus. In his career, Ian has created hundreds of custom fund lineups for corporations, universities, cities, states and other retirement plan clients all over the country, ranging in size from several million to several billion dollars. He also created the quarterly Voya Financial home-office’s “Model Portfolios” that were then sold by hundreds of financial advisors and used by thousands of clients in the Corporate, Government, Education and other Non-Profit markets.

In addition, Ian has performed in-person due diligence on hundreds of investment strategies / mutual funds with the investment specialists from most of the country’s elite investment management firms. Through his years of experience, Ian is intimately familiar with investment strategies, fees, revenue sharing arrangements, hidden costs and other aspects of retirement plan investing. He will now share that experience and knowledge with clients.

## Greenlight Retirement Plan Consultants, LLC

### **What We Do**

We work closely with plan sponsors to provide them with all the knowledge, documentation, and advice they require to make the best investment decision on behalf of plan participants. We help protect plan fiduciaries from liability stemming from inappropriate investments and excessive fees.

### **Services and Reports**

Take a look at our website at [www.GreenlightRPC.com](http://www.GreenlightRPC.com) to see a list of all the services and reports we provide. They are all geared towards making life easier for plan fiduciaries, provide back-up documentation for all investment deliberations and decisions, and help reduce the plan's overall costs.

We offer both one-time services and reports, as well as ongoing monitoring services and reports. We even offer an option for select plans where we don't get paid until the plan has actually saved enough money to pay for it.

### **Adhering to Regulations**

The Department of Labor ([www.dol.gov](http://www.dol.gov) "Meeting Your Fiduciary Obligations") requires that plan fiduciaries have an expertise in investment analysis and ensure that participants pay "reasonable fees". Lacking that investment expertise, the DOL advises plan sponsors to hire an investment professional.

At GRPC, we have the professional expertise and experience to help you create a well-managed retirement plan with a clear process and meticulous documentation in place for monitoring your investments.

### **Contact**

Contact us today to see how we can help you meet your fiduciary duties and improve the quality and cost-effectiveness of your plan.

## ***Greenlight Retirement Plan Consultants, LLC***

Ian Green, CFA    President  
Web:                [www.GreenlightRPC.com](http://www.GreenlightRPC.com)  
E-mail:            [info@GreenlightRPC.com](mailto:info@GreenlightRPC.com)  
Phone / Text:    (860) 461-1124

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