Jennifer R. Figurelli, CTFA & Andrew D.W. Hill, CFA

With more than 30 years of combined experience working and living in the Naples area, Andy Hill and Jennifer Figurelli are here to serve the unique financial needs of their clients.

Available 24/7, Andrew Hill Investment Advisors is there when a client needs them the most.

ResponsibleAdvisors.com

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Pension Plan Services

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Offering a retirement plan can be one of the most challenging, yet rewarding decisions an employer can make.   Pension Plans are one of the best wealth accumulation strategies, offer many tax advantages and are generally protected from creditors' claims.

However, administering a retirement plan and managing its assets involves a number of complex responsibilities and a certain level of expertise.

Understanding your fiduciary responsibilities as a Trustee is important for the security of a retirement plan and compliance with the law.

The partners of Andrew Hill Investment Advisors, Inc. ("AHIA") have 30 years of combined experience in the financial services industry serving in various fiduciary capacities.

As a Registered Investment Advisor, AHIA can assist you in upholding your fiduciary responsibility as a plan Trustee by matching the investment strategy to the demographics of plan participants, and also offering you and your staff access to a number of personally tailored "financial concierge" services.

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Services to Trustees of Pension Plans:

- ✓ Assistance with upholding your fiduciary obligations
- ✓ Develop an Investment Policy Statement specific to the Plan's objectives
- ✓ Active, customized investment management
- ✓ Ongoing communication with the Plan Administrator
- ✓ Serve as a resource to staff for various financial issues, including retirement, income tax planning, and estate planning
- ✓ Serve as an investment resource to participants leaving the plan