



A STEP AHEAD IN RETIREMENT PLANS

Warren Averett Asset Management works with clients to meet their employee benefit plan needs. A company may be looking for better investment options, a more cost effective plan design or a higher level of service. Warren Averett provides professionals with expertise in performing many aspects and services related to their company's retirement plan.

HIGHLIGHTS

- Investment management and plan administration provided by one company
- Independent – not affiliated with a mutual fund family or insurance company
- Open architecture platform – Investment Committee chooses from thousands of mutual funds
- Transparent and easily understood fee structure
- Consulting and plan design services
- Serves as highest level section 3(38) Investment Fiduciary
- Ongoing plan review and employee education meetings
- Personal account service for each client with assigned dedicated advisor

401k COMPLETE

401k Complete, an offering by Warren Averett Asset Management, is a unique comprehensive retirement plan solution that includes investment management and recordkeeping/administration services under one retirement plan umbrella. The result is fewer administrative headaches for the plan sponsor and a higher level of confidence and participation by the employees—all with a transparent and competitive fee structure.

401k Complete

Your total retirement plan solution.

WE SERVE AS A CO-FIDUCIARY

Warren Averett Asset Management can serve as an ERISA 3(38) Investment Fiduciary, making the investment management decisions (including selection and ongoing monitoring of the fund lineup and asset allocation decisions for the risk-based models) so you don't have to.



Learn more at www.WAasset.com

ABOUT WARREN AVERETT ASSET MANAGEMENT

Warren Averett Asset Management is a Registered Investment Advisory (“RIA”) firm that advises on assets in excess of \$2.5 billion. Warren Averett also provides retirement plan design and administration services. Whether your organization has an existing plan or is considering starting a new plan, our team can help you streamline the administration and design a retirement plan that best fits the unique needs of your company. Regardless of the design, Warren Averett has the experience and expertise to successfully handle any of your plan needs.

We strive to provide proactive, personal service by listening and fully comprehending your financial goals. We are different from many other asset management firms in that we are a fee-only firm. That means we provide independent advice that is not based on selling products but on helping our clients achieve their financial goals. Learn more at www.WAasset.com.

“Our goal is to partner with clients to design and manage an optimal retirement plan solution. This solution must simultaneously align with company goals and empower employees to prepare for their future.”

– Steven C. Causey, CPA, AIF
Managing Director,
Senior Retirement Plan Consultant
Warren Averett Asset Management



Learn more at www.WAasset.com

EXPERIENCE A DIFFERENCE THAT WORKS TO YOUR ADVANTAGE

Count on:

- Independence – we operate free from quotas, fund restrictions and proprietary products;
- Discipline – a data-and-detail driven approach with in-depth research and reliable follow through;
- Better return on relationships – advisors passionately committed to seeing you and your employees well prepared for retirement.

SERVING CORPORATE RETIREMENT PLANS RANGING FROM A FEW TO THOUSANDS OF EMPLOYEES

Warren Averett Asset Management's 401k Complete covers the spectrum of corporate retirement plan needs, including:

- Investment management
- Daily participant recordkeeping
- Plan administration
- Compliance testing
- Government reporting
- Employee education meetings
- Documented annual plan reviews

For a complimentary plan assessment or to find out how we can help you, meet our team at www.401kcomplete.com or contact us:

Atlanta, GA - 770.396.1100

Birmingham, AL - 205.979.4100

Homewood, AL - 205.871.3334

Huntsville, AL - 256.533.7610

Montgomery, AL - 334.271.2200

Pensacola, FL - 850.435.7400

Tampa, FL - 813.229.2321