

The ESG Retirement Solution



What Makes The ESG Retirement Solution the Right Choice?

Today, employers and employees are interested in retirement plan investments that make a positive impact not only on their lives but also the lives of others.

The ESG Retirement Solution offers comprehensive, bundled 401(k) plan services with full fiduciary outsourcing capabilities for companies who align themselves with the importance of socially responsible investing, and offers plan sponsors a path toward simpler, safer, easier plan administration by outsourcing both the fiduciary administrator and investment oversight roles.

The ESG Retirement Solution brings together a comprehensive array of plan services, fiduciary support and investment options to offer you and your employees a seamless retirement plan solution designed to deliver more successful retirement outcomes.

Fiduciary Relief & Professional Oversight

The ESG Retirement Solution offers the ability to outsource fiduciary responsibility. By participating, you transfer virtually all fiduciary responsibility for the management of your retirement program—your name comes off the legal documents as Named Fiduciary, Trustee and Plan Administrator—eliminating the primary fiduciary responsibilities that come with sponsoring a retirement program.

Streamline Plan Administration

With the **ESG Retirement Solution**, plan administrative responsibilities are outsourced—shifting the burden for plan administrative responsibilities to a professional fiduciary, thus streamlining plan operations. That translates into less time spent managing your retirement program, with more time to focus on your business.

Professional Investment Management

Investment management is outsourced to a professional investment fiduciary, who prudently selects and monitors ESG/SRI investments in accordance with a written investment policy statement designed specifically for the Plan. You receive a retirement plan aligned with the importance of “green” investing with the added benefit of professional investment fiduciary oversight.

**For more information contact the Pentegra Solutions Center at
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