Upgrading the Participant Experience

Thom Shumosic, CFP, AIF

MidAtlantic Retirement Planning Specialists
Wilmington, DE



"Providing Sustainable Retirement Income Solutions"

Why Help?

What Others Think of Us

Mistakes Have Been Made

Are You a Fiduciary?

Ground Rules for Engagement

Rolling Up Your Sleeves

A Note About Beneficiaries

Create Alliances

I'm Too Busy, My Boss Won't Let Me, I Don't Want To!!!!

A Suggestion

Thank you!

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