

401K



SPRING CITY PARTNERS

Where Wall Street Knowledge Meets Main Street Values

Disclaimer



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Firm and Managing Partner Overview

Spring City Partners (SCP), is an independent registered investment advisor (RIA). With roots in a thriving family business on Main Street and an investment bank on Wall Street, Spring City Partners was founded on the principles that investment and financial planning should be accessible, transparent, and collaborative. In an era of robo-advising and automation, I believe investing should be personal. At Spring City Partners, you are never just numbers on a spreadsheet.

William D. March III, founded Spring City Partners in July 2018. Prior to founding Spring City Partners, Bill was a Vice President at Janney Montgomery Scott responsible for equity research within the Healthcare Sector. Before this, Bill was a Senior Associate at KLS Professional Advisors, a Registered Investment Advisor with ~\$6.0 bn in assets under management. His first job was as a staff accountant at his family's business, Premier Payroll Services, Inc.



Why Spring City Partners?



Savings



Service



Specialization



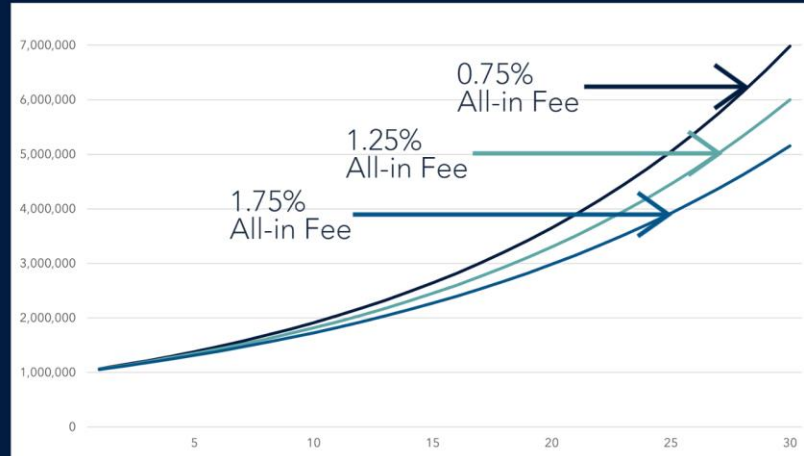
Seamless

Are you one of the **47% of small businesses considering switching your 401K plan** to a new advisor?

My background on Main Street and Wall Street, provided me an education on the **importance of Service and Savings** when partnering with small businesses.

Leveraging relationships across the retirement and payroll ecosystem, I can provide you an integrated workflow reducing your administrative burden.

Don't Let High Fees Eat Away Your Returns!



This hypothetical example shows how the cost of fees compounds over time, based on a \$1,000,000 starting balance, 7.5% annual returns, and different annual fees.



1.0% in higher fees could cost you \$1.8m over the next 30 years.

Savings

Are you aware of the all-in cost of your retirement plan?

- Benchmarking analysis equips you with the necessary information to fulfill your plan's fiduciary duty, potentially saving you millions in fees.

Service

- Spring City Partners view this relationship as a two-way street where we can assist you in standing out from the competition for top employee talent.
- **Monthly webinar (zoom)** on a general finance or investing topic.
- Additionally, we provide one annual office visit, tailored to suit the needs/goals of you and your employees.



Specialization

We have relationships with payroll providers, TPAs, and recordkeepers to develop an integrated solution.

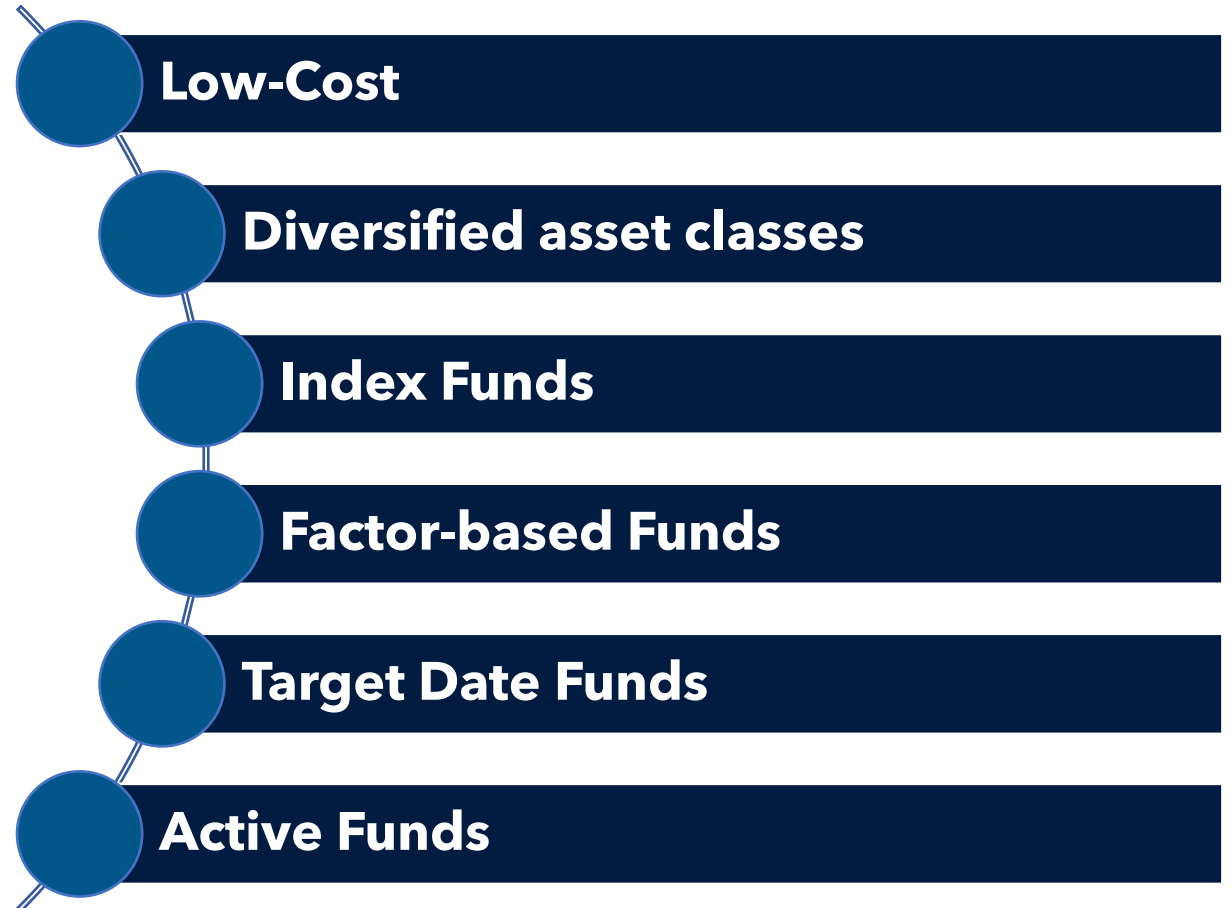
I serve as the quarterback for your company ensuring all parties are synchronized.

Utilizing experts in each domain, ensures you get the service you deserve at a fair and transparent price. There are **no hidden fees or agendas!**



Investments

- Combine knowledge from time spent on Wall Street with sensibility of Main Street, we developed a 401k menu meant to deliver the returns you and your employees deserve.
- Acting as a fiduciary, we have zero self-dealing or compensation arrangements with any vendors or products.



Seamless

401K



Payroll



- **Eliminate Manual Processes**
- **Streamline back-office**
- **Reduce costs**

- Vetting recordkeepers enables integration between payroll and 401K recordkeepers.

- 180- or 360-degree integration capabilities reduce administrative workload, saving valuable time and resources.

Introduction

Learn about your business and goals.

Retirement Survey

You complete Retirement Survey.

Organize

Utilize survey to request proposals from vetted vendors.

Formalize

Present detailed plan and Investment Policy Statement.

Sign agreement!

Optimize

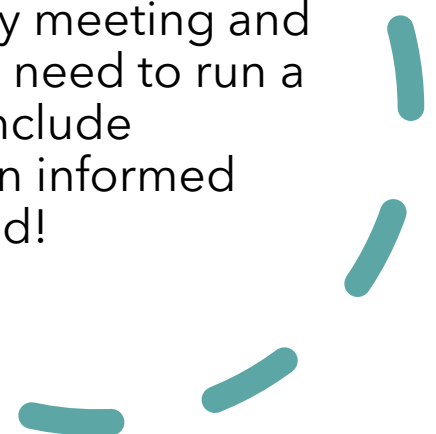
Work with you, vendors, & employees to rollout plan.

Monitor

Leverage IPS for ongoing oversight. Provide continuing education.

Process

Our streamlined process lets ***you focus on your business*** while ***we handle your plan!*** One introductory meeting and completion of our Retirement Survey is all we need to run a formalized RFP. Rest assured our results will include **transparent pricing**, enabling you to make an informed decision without any ambiguity or time wasted!



Retirement Survey

Existing Plan

Documents:

408(b)(2)

404(a)(5)

Asset Statement

General Information:

of Employees

Participating

Value of Plan

Annual Contributions

New Plan

Documents:

General Information:

How many =>5%
owners

Any employees to
exclude

Who do you want
making contributions

Our detailed [survey](#) allows you to provide additional insights about your company, plan, and goals.

Click the link above for a writable PDF.



Contact Information

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