


The investment and fiduciary professionals

KidderAdvisers

We sit on the same side of the table.
And guide you through all the choices.



From fiduciary guidance
to tax-advantaged planning,
we work to help you and
your employees succeed.

Does your current advisor force you to make
decisions and be a plan expert?

Are you uncomfortable with your fiduciary
responsibilities and liabilities?

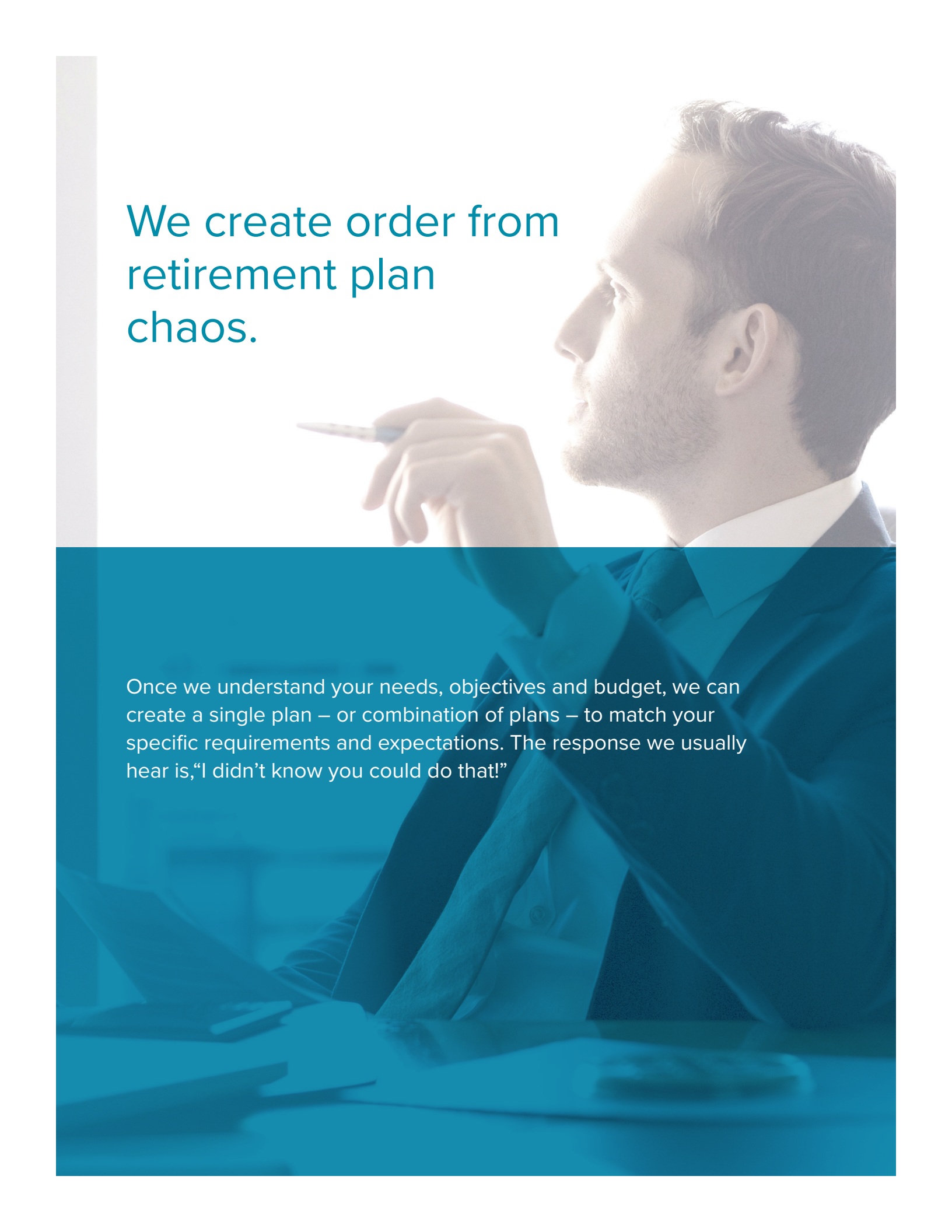
Is your personal wealth strategy on track?

Think of us as your independent guide through the complexities and responsibilities of managing your organization's retirement plan, your own retirement plan, your succession strategy – even your own personal wealth.

Kidder Advisers is an independent investment advisory and consulting firm focused on the wealth accumulation and retirement plan needs of businesses and nonprofits, as well as their owners, managers and employees.

We are experienced in servicing all types of defined contribution and defined benefit plans – including 401(k), profit sharing, ESOP, cash balance, age-weighted, cross-tested, 403(b) and 457(b).

Rather than off-the-shelf solutions, we leverage our relationships with many of the industry's major providers to develop personalized, transparent retirement and wealth management solutions.

A man in a dark suit and white shirt is shown in profile, looking upwards and to the right. He is holding a pen in his right hand, resting his chin on it. The background is bright and out of focus. The bottom half of the image is covered by a solid blue overlay.

We create order from
retirement plan
chaos.

Once we understand your needs, objectives and budget, we can create a single plan – or combination of plans – to match your specific requirements and expectations. The response we usually hear is, “I didn’t know you could do that!”

Kidder Advisers is an independent provider of retirement plan services for both qualified and nonqualified plans.

We add value by helping plan sponsors optimize tax deductions, reduce costs, educate employees, address fiduciary responsibilities and make appropriate investment choices. Every step of the way, we see it as our job to smooth and solidify plan processes, while helping to protect the needs of both plan sponsors and employees. We have tools and processes to aid in selecting appropriate plan vendors, benchmarking plan performance and resolving preexisting issues with the IRS or Department of Labor.

Select Appropriate Investments

Our proprietary tools and processes help you maintain investment due diligence and all supporting documents. Our independence enables you to access a full spectrum of industry-leading investment platforms and strategies.

Reduce Investment Fiduciary Liability

Most plan sponsors are ill-equipped to deal with ever-changing ERISA requirements and other potential liabilities. We help you save time and reduce personal risk, while working to protect the interests of everyone associated with the plan.

Educate Your Employees

We help employees make the most of their plan by helping them understand how much they should be saving and how they should allocate their money among the various investments offered by the plan. We aim to provide seamless processes for employee rollovers and distributions.

Measure Plan Performance

We help you assess and improve your plan by measuring participation levels, deferral percentages, investment results and more. We dissect all fees and compare them to industry standards.

Build a Better Plan

Ongoing regulatory changes make it critical to evaluate the legal, compliance and design aspects of your plan on a regular basis. We work to provide tailor-made qualified and nonqualified solutions that optimize tax deductions and satisfy the needs of employers, employees, third-party advisors and regulators.

Document Everything

We help offer experienced processes and procedures that ensure the timely completion and distribution of all reports, as well as the satisfaction of all plan requirements.

A woman with dark, curly hair is smiling and looking out of a window. The background is bright and slightly blurred, suggesting an office or modern building interior. The image is used as a background for the text.

We help build wealth
for you and your
key employees.

The same experience, tools and resources we use to manage and grow clients' retirement assets position us well to serve the broader financial needs of plan sponsors, executives and their families.

As an independent, investment advisory and consulting firm, Kidder Advisers works with a wide range of professional money managers, investment families, alternative investment managers and life & annuity carriers to help create effective, transparent, tax-favored plans and processes to help grow wealth, optimize income and address the financial future of your heirs.

We can create personalized deferred compensation benefit programs to help you recruit and reward key employees by working to bridge the retirement income gap. We can work closely with you, your successors and your advisory team to design and fund succession plans involving family members, key employees or third parties.

All of this work is a natural extension of the retirement planning process, and we pursue it with the same attention to detail, integrity and transparency that we bring to our investment and fiduciary-related duties.

Bridge the Retirement Income Gap

Will you and your key employees be able to live well in retirement? We can design a deferred compensation program to help you and your key employees overcome 401(k) restrictions, increase retirement savings, manage tax timing and facilitate succession strategies.

Address Continuity for Your Business and Heirs

Based on your needs, objectives and timeframe, we help identify and develop effective, tax-favored, buy-sell funding mechanisms that benefit you and your successors, while providing continuity and confidence for your employees.

Build a More Effective Portfolio

Based on your risk tolerance, tax situation, income, expenses and expectations, we recommend appropriate asset categories, allocations and managers.

Reduce Taxes and Optimize Income

Tax-free and tax-deferred investing opportunities, as well as tax-favored distribution strategies may add value to your portfolio and estate.

We develop retirement income funding and investment strategies that reflect our tax expectations. Then we develop tax-favored strategies for disbursing previously tax-deferred assets.

Create a Tax-Advantaged Estate

We consult with clients' attorneys, CPAs and other financial advisors to help structure more effective, tax-advantaged estate and wealth transfer plans. We are fluent in the development and administration of sophisticated trusts.

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