OCRO

OUTSOURCED CHIEF RETIREMENT OFFICER

You've got a retirement plan... but who's making sure it's efficient, compliant, and working for your people? Maybe it's time to bring in an OCRO.

Navigating the Complexities of Retirement Planning Can Be Daunting!

At Asset Strategy, we specialize in **Retirement Plan Consulting**, offering customized retirement solutions for businesses of **ALL** sizes, guided by our expert **Outsourced Chief Retirement Officer (OCRO).**

What is an OCRO?

An OCRO is a ***specialized third-party*** *professional contracted to manage and oversee retirement plans and strategies, embodying the responsibilities of an in-house Chief Retirement Officer.*

The Organizational Benefits of Engaging an OCRO?

- **Improved Plan Performance**
- **Enhanced Compliance & Fiduciary Risk Management**
- **Retirement Plan Design Optimization**
- **Fiduciary Investment Management**
- **Financial Wellness — Employee Education & Success**
- **Access to Specialized Expertise**
- **Cost Efficiency**
- **Scalability and Flexibility**

The Types of Retirement Plans We Establish

- 401(k) Plans
- 403(b) Plans & Other Not-For-Profits
- Solo 401(k)s
- Profit Sharing Plans
- Cash Balance Plans
- Simple IRAs & SEP IRAs

Meet Asset Strategy's OCRO, Tim Black

Our OCRO Tim is a retirement industry veteran with over **30 years of experience** servicing retirement plan sponsors and participants. With a career beginning on Wall Street, a former CPA at a Big 4 CPA firm, and retirement plan administration, operations, and finance experience, **Tim has worked with employers ranging in size from 40,000 employees to single-employee startup plans**. Tim is also a Certified Plan Fiduciary Advisor with the National Association of Plan Advisors (NAPA). He has degrees in both Economics and Accounting from Boston University.

Why Partner with Asset Strategy?

1) Experience
- Decades of expertise in Retirement Plan Consulting across various industries.

2) Personalized Approach
- Customized solutions that align with your organization's unique goals and culture.

3) Commitment to Excellence
- Dedicated to delivering exceptional service and measurable results.

The Value of Independence

As an independent firm, Asset Strategy always prioritizes your best interests. We assume a fiduciary role in your retirement plan.

Your Dedicated Retirement Plan Consulting Team

Tim Black
CPFA
Senior Consultant
Director of Retirement
tjb@assetstrategy.com

Kent Fitzpatrick
AIFA®, GFS®, MSCTA©
Managing Director
Partner
kaf@assetstrategy.com

Rosario Salamone
MAFM, CIMA®
Director of Investment Research
Partner
rss@assetstrategy.com

Because investor situations and objectives vary this information is not intended to indicate suitability for any individual investor. This is for informational purposes only, does not represent legal or tax advice, does not indicate suitability for any particular investor, and does not constitute an offer to purchase or sell investments. Investments in securities involve a high degree of risk and should only be considered by investors who can withstand the loss of their investment. There are retirement account risks that could diminish investor returns, such as, but not limited to: low interest rates, market volatility, withdrawal timing and sequence of returns risk, government policy uncertainty and increased longevity. Prospective investors should perform their own due diligence carefully and review the "Risk Factors" section of any prospectus, private placement memorandum or offering circular before considering any investment. Advisory Services are offered through Asset Strategy Advisors, LLC (ASA), an SEC Registered Investment Advisor. Securities offered through registered representatives of Concorde Investment Services, LLC (CIS), member of FINRA/SIPC. Insurance Services offered through Asset Strategy Financial Group, Inc. (ASFG). ASA, CIS, and ASFG are independent of each other. **#ia-sc-r-a-467-6-2025**

Let's Talk!

www.assetstrategy.com/retirement

info@assetstrategy.com

781-235-4426

Scan the QR code to schedule a meeting with our Director of Retirement, Tim Black.