



Insurance | Risk Management | Consulting

Total Retirement Solutions for Public Sector

You Serve the Public, We Serve You!

PENSION SOLUTIONS

Investment Monitoring, Actuarial, Auditing, Administration Support

PLAN DESIGN

FICA Alternative (3121), 401(a), 403(b), 457(b), Defined Benefit, Special Pay, DROP Plans

RETIREMENT PLAN CONSULTING

Mitigate Employer Risk, Reduce Plan Fees and Help Improve Retirement Outcomes

FINANCIAL WELLBEING

Education, Coaching and Planning to Improve Employee Financial Outcomes

OPEB TRUST & SOLUTIONS

Reduce OPEB Liability by Prefunding Expenses, Design HRA with VEBA Trust, Actuarial Valuation Support

Social Responsibility

Companywide focus on ethical conduct, employee health and welfare, environmental integrity and community service

2,200+ Client Plans¹

Proud Sponsor

- AASPA
- ASBO
- GFOA
- ICMA
- IFEBP
- NACo
- NAGDCA
- NASRA
- NCPERS
- NFBPA
- NLC
- NPELRA
- PSHRA
- SHRM

\$172+ Billion In Assets Under Care¹

Forbes 2023
AMERICA'S BEST LARGE EMPLOYERS

POWERED BY STATISTA

NAPA
TOP DC ADVISOR TEAMS
MULTI-OFFICE



- CFA® Charterholders
- Accredited Investment Fiduciaries
- Certified Financial Planners
- Enrolled Actuaries
- ERISA Counsel

10,000+
Public Sector and K-12 Education Clients Globally²

¹ As of 12/31/2023. Gallagher is a global leader in insurance brokerage, risk management and HR & benefit consulting services. As part of its consulting services, Gallagher offers two affiliated investment advisory firms that are tailored to provide varying client needs. Under Gallagher's affiliated advisors, we advise on over \$172 billion in assets.

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² Clients of Arthur J. Gallagher & Co. as of 1/1/2024

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PLAN GOVERNANCE

- Committee establishment and documentation
- Fiduciary risk mitigation guide
- Annual fiduciary liability review
- Fiduciary education and training
- Meeting minutes

EMPLOYER EXPERIENCE

- Facilitate Request for Proposals
- Extension of HR team
- Fee and service benchmarking
- RFP Support
- Administrative issue resolution

ACTUARIAL SERVICES

- Funding strategy and consulting
- GASB compliance
- Administration support

COMPLIANCE

- Monitor legal and compliance issues
- Operational compliance review
- Updates on legislative action
- Whitepapers, technical bulletins and webcasts
- DOL and IRS audit support

INVESTMENT OVERSIGHT

- Investment Policy Statement (IPS)
- Investment due diligence
- Quarterly investment menu review
- Qualified Default Investment Alternative (QDIA)

PLAN DESIGN

- Plan design benchmarking
- Industry best practices review
- Financial wellbeing integration
- Service Level Guarantees
- Plan document review

PARTICIPANT ENGAGEMENT

- Education Policy Statement
- Personalized participant education, coaching and financial planning
- Help increase plan participation and contributions
- Coordination of educational deliverables
- Implementation of best practices for participant engagement
- Communication review

THE EMPLOYEE PERSPECTIVE

83%

View financial wellness benefits as a sign their employer values them¹

65%

Expect their employer to offer more financial support than before the pandemic¹

84%

Say their financial wellbeing impacts their mental health & stress levels²

80%

Report their financial wellbeing impacts their physical health²

¹ Betterment, "The Impact of the Great Resignation on Benefit Needs and Expectations" 15 Dec 2021. PDF download.

² Sofi at Work, "2022 Employer & Employee Perspectives" The Future of Workplace Financial Well-Being, 14 March 2022. Gated PDF.

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