

In This Issue

[10th Anniversary](#)

[Our First Client](#)

[Recent Client Projects](#)

[New Employee](#)

[Resources](#)

Quick Links

[CRG Website](#)

[Newsletter Archive](#)

[Related Articles](#)

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10th Anniversary

CRG is pleased to celebrate its 10 year anniversary! We look forward to continuing to provide trusted independent advice to our current and future clients. We'd like to thank all our clients far and wide who have asked for our help with their retirement plans. For a sampling of our recent client projects, see below.

Our First Client

In celebrating our 10th Anniversary, we would like to highlight our first client, Plan International.



Plan works with 1.3 million children, their families and communities in developing countries all over the world, implementing projects at the grassroots level in health, education, water and sanitation, income-generation and cross-cultural communication.

Plan raises over \$541 million a year, primarily from individuals through child sponsorship, and actively involves local communities in setting up and implementing projects.

To learn more, please visit their website at - <http://www.plan-international.org/>

Recent Client Projects

Over the past ten years, we have worked on a variety of retirement plan projects. Some of the more recent examples are below:

- Helping a client with a frozen DB plan come up with an investment and structural strategy to terminate plan within one to three years
- Investment performance monitoring of a \$140 Million 401(k) plan

including overall fiduciary review

- Overall risk review of a company's retirement plan structure
- Comprehensive strategic review of a company's retirement strategy
- Successful plan termination of a DB plan
- Competitive annuity quotation process to gauge cost of settling plan's liability in annuity marketplace

New Employee

We would like to welcome our newest employee!

Maureen McClain has joined the CRG staff as a Benefits Analyst. She was graduated from Providence College with a degree in Mathematics and a concentration in Business Studies. You can contact Maureen at - maureen@cassidyretirement.com

Resources

For more information on Cassidy Retirement Group, please visit <http://www.cassidyretirement.com>.