Fiduciary Comparison Chart

	Non-Fiduciary Plan Advisor	3(21) Plan Advisor (Co-Fiduciary)	Typical 3(38) Investment Manager (Fiduciary)	Fisher 3(38) Investment Manager (Fiduciary Plus)
Obligated to make recommendations in your best interest		~	~	~
Make recommendations on plan investment options			~	~
Monitors and updates plan investment options			~	~
Incentive structures aligned with client success (no revenue sharing)				~
Help create and maintain a fiduciary audit file				~
Fiduciary education for plan committee				~

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