

RFG ProActive Review

A thorough assessment of each client's plan, adhering to fiduciary standards and leveraging the team's expertise



ProActive Review Objectives:

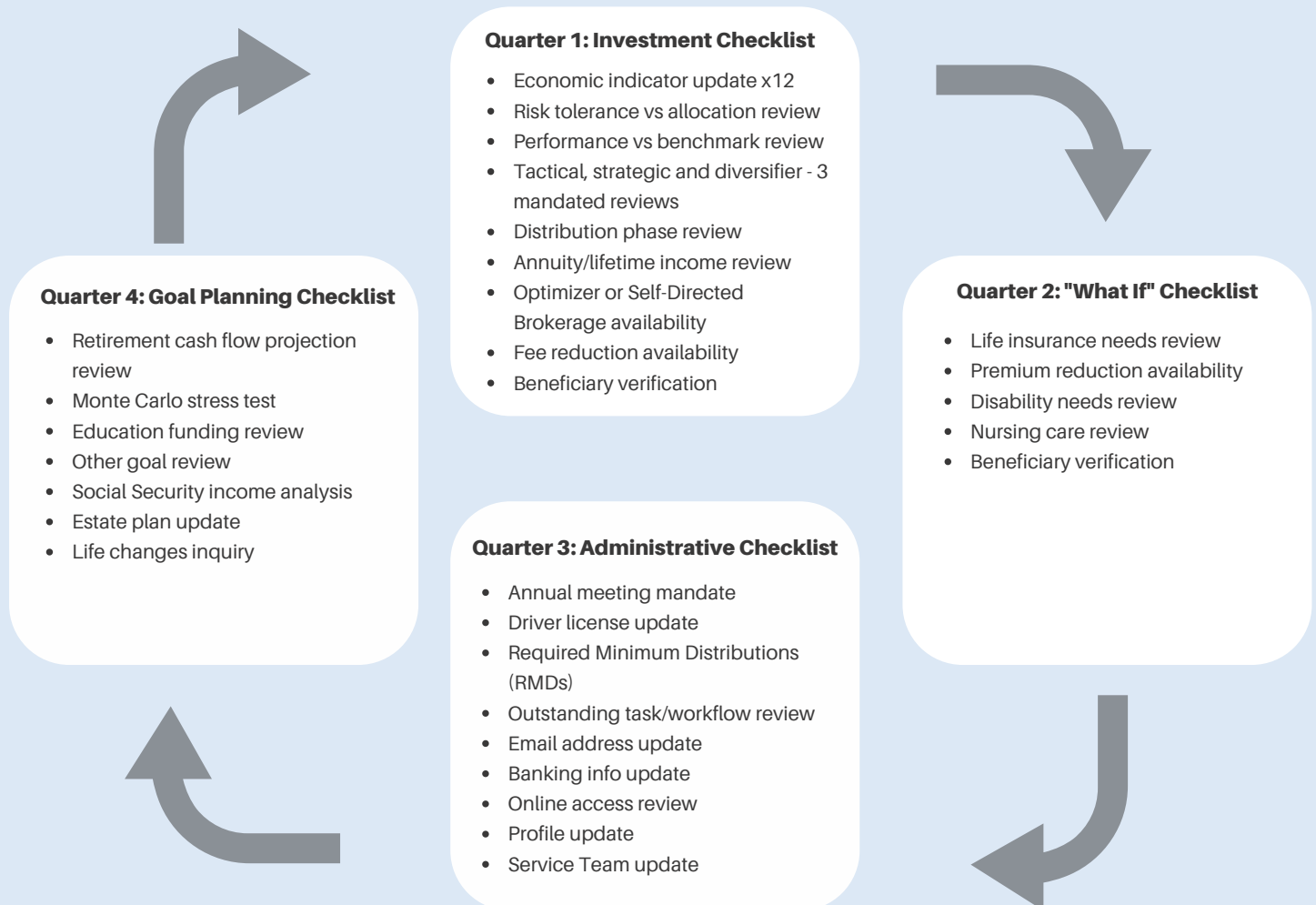
Process: We follow a systematic process incorporating fiduciary standards

ProActive: Our *ProActive Review* process ensures regular oversight, monitoring, and updates from our team

Team: Your RFG Service Team collaborates to provide comprehensive insights and oversight of your plan

ProActive Review Process:

Once we have implemented a plan and established accounts, our ongoing engagement requires monitoring. Our systematic approach involves a comprehensive review of your profile by your dedicated service team every quarter. We've implemented rigorous standards to ensure that no details are overlooked. You will be kept in the loop throughout this process, and we remain at your service for any unforeseen circumstances that may arise - we understand that such occurrences are inevitable aspects of life



Timing of the *ProActive Review* varies based on service model

RFG believes the *ProActive Review* is critical to a client's success. Our team dedicates over 1,000 hours annually to the *ProActive Review* Process, always putting the interests of our client's first