

# DELIVERING CONSISTENT VALUE

MEETING YOUR NEEDS



Prepared for our  
Retirement Plan Meeting

Advisor Logo

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**Name of Advisor**  
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**QBI, LLC**  
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# WORKING TOGETHER

Successful retirement plan leadership starts with you. You need and deserve the highest quality service to ensure your plan continues to meet your retirement objectives. We map out the full range of your responsibilities and provide a framework for developing a successful, compliant retirement plan.

Clients

QBI  
Third Party  
Administrator

Financial Advisor

Plan Provider

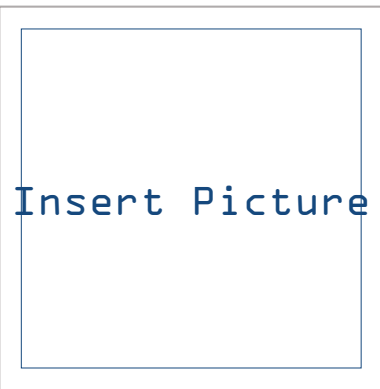


As your selected team of professionals, we strive to keep your plan in compliance, focus on cost management, and assist your employees with saving for their retirement goals.

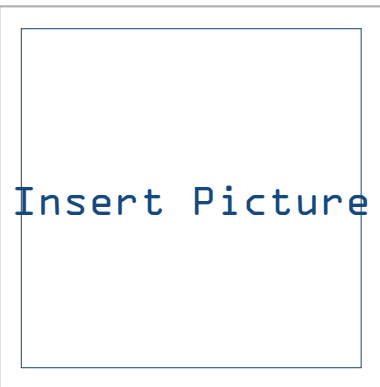


# WHO IS [ADVISOR OFFICE]?

Advisor Logo



Insert approved biography



Insert approved biography



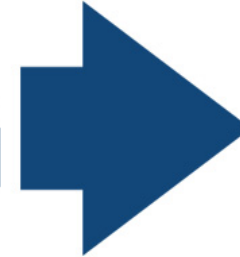
# Who is QBI?

Far from applying an assembly line approach, QBI understands that each business or business owner has a distinct goal in mind for establishing a retirement plan. Whether a small business wishes to establish a profit sharing plan to reward and retain employees, or a business owner hopes to maximize tax advantages, QBI has the expertise to establish and administer both simple and highly complex retirement plans.

Since 1978, QBI has specialized in the development and implementation of retirement programs. We've developed a sophisticated base of experience in designing custom-tailored plans to fit the needs and objectives of businesses in widely different sectors and sizes.

QBI's goal is to continue to meet the needs of its clients and their employees well into the future.

SERVING CLIENTS FOR OVER  
**35** YEARS



PROVIDING ADMINISTRATION  
TO MORE THAN  
**3 2 0 0**  
P L A N S

EMPLOYS OVER

**80**

PROFESSIONALS

**17** STAFF MEMBERS WITH **ADVANCED INDUSTRY CREDENTIALS**  
**INCLUDING:** **QKA, QPA, CPC**  
**ERPA, CEBS, EA**

For more than three decades, QBI has been working hard to become the "go-to" expert partner to retirement plan advisors and their clients.

Above is a snapshot of who we are today.



# Statement of Services



## EXCEEDING EXPECTATIONS

We don't compartmentalize customer service. We offer a complete team to each client, able to manage all the details, from large to small. What does that mean for you? You make one phone call—we handle it from there.



## SIMPLIFYING PLAN DESIGN

We work with our clients, keeping their objectives first in mind. We earned our reputation for creative plan design by honoring this commitment.



## PEOPLE MATTER

We believe people drive success and they are our greatest asset. Systems create efficiency - Our people create value.



## PEACE OF MIND

Our goal is to continue to meet the needs of our clients and their employees well into the future.

