

ERISA 3 (38) Fiduciary Services

Roles & Responsibilities

BLBB
Provides ERISA
Annual
Compliance
Guidebook



YOU
Review
guidebook,
calendar & set
internal deadline
reminders

BLBB
Live and
pre-recorded
employee education
webinars



YOU
Schedule, provide
notice & webinar
links to participants

BLBB
Quarterly
Investment
Reports



YOU
Review reports
quarterly &
annually

BLBB
Sample
Investment
Policy Statement



YOU
Periodically
customize,
review & update
your IPS

BLBB
Additional access to
Investment
Education



YOU
Distribute
education to
employees

BLBB
Guidance for your
Annual Compliance
Review



YOU
Complete Annual
Compliance
Review