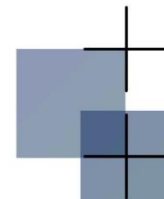


Retirement Plan Services



As of 12/31/2023, BLBB Advisors oversee approximately \$2.3 billion in client assets. With sixty years of experience in the financial services industry, BLBB Advisors, an SEC registered investment advisor, provides a comprehensive suite of wealth and investment management services to a diverse range of individual, non-profit, and corporate clients.

Retirement Plan Services for Businesses

In addition, BLBB also serves as an ERISA 3(38) fiduciary advisor for employer-sponsored retirement plans, to support plan sponsors in minimizing liability. Our typical clientele consists of small and medium-sized businesses seeking to provide their employees with robust, cost-efficient, and customized retirement plans, while simultaneously, maximizing the tax deferral options for business owners themselves.

Services provided to business clients include:

- Facilitating connections between business owners and plan designers and custodians
- Assisting in the selection of a diverse array of investment funds for plans, considering key criteria such as performance, fees, management tenure, and third-party ratings
- Ongoing monitoring, reviewing, and updating of the investment funds available in the plans
- Educating plan participants on the various investment options inside their plans, the importance of saving for retirement, and the significance of asset allocation
- Serving as a resource to plan participants, addressing any inquiries about their investment options or other plan features; and
- Ongoing evaluation of plan design opportunities, including new comparability, cash balance, auto-enrollment, or non-qualified deferred compensation plans

PLAN. INVEST. SUCCEED.®

www.BLBB.com
215.643.9100

Mailing address
P.O. Box 1010, Montgomeryville, PA 18936

Street address
103 Montgomery Avenue, Montgomeryville, PA 18936

Retirement Plan Services for Business Owners

Aside from aiding business owners in providing efficiently managed and cost-effective retirement plans for their employees, we work closely with business owners themselves to assist them in organizing their own personal retirement savings plans with a focus on optimizing their savings for retirement in a tax-advantaged manner.

To learn more about retirement plan services, contact your BLBB Retirement Plan Services team today (215) 643-9100.

Meet our Retirement Plan Services Team



[Edward J. Barnes](#)

Financial Advisor &
Director of Retirement Plans



[Brianna Barnes March](#)

Financial Advisor &
Director of Retirement Plans



[Lisa A. Driscoll](#)

Retirement Plan
Service Coordinator



[Gina C. Brown](#)

Client Service Administrator

