lebel& harriman
RETIREMENT ADVISORS

Employer Financial Services

Retirement Plan Advisory Services

lebelharriman.com | contact@lebelharriman.com | (207) 773-5390

Why Lebel & Harriman?

Independent Fiduciary

- Client-Focused Advice
- Fee-Based Advisory Model
- No Proprietary Products

Locally Owned & Operated

- Maine-Based Team
- Rooted in Community
- Trusted by Generations

Personalized Attention

- Dedicated Service Team
- Responsive Management
- Tailored Strategies

We partner with plan sponsors to build and maintain retirement programs that protect fiduciaries, engage employees, and drive meaningful outcomes. Every recommendation is grounded in your best interest.

Fiduciary Services

- 3(21) or 3(38) Fiduciary Services
- Investment Menu Design & Monitoring
- Committee Charter & IPS Development
- Fiduciary Training & Meeting Minutes
- Fee Benchmarking & Analysis

Employee Engagement

- Group Education Sessions
- One-on-One Employee Consultations
- Custom Digital Education Platform
- Monthly Financial Wellness Workshops
- Targeted Engagement Campaigns

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Benefits Design & Strategy

- Plan Design Consulting & Benchmarking
- QDIA Suitability Analysis
- Lifetime Income Solutions
- Regulatory & Legislative Updates
- Recruitment & Retention Strategies

Administrative Support

- Dedicated Relationship Manager
- Plan Document & Correction Review
- Audit & Compliance Support
- Conversion & Vendor Management
- Plan Sponsor Newsletter

250+	$6b+	99.8%	10+	93
ERISA Retirement Plans	ERISA Assets Under Advisement	Client Retention Rate (3-Year)	Average Client Tenure (Years)	Net Promoter Score (2025)

Securities offered through Valmark Securities, Inc. Member FINRA, SIPC. Investment Advisory Services offered through Valmark Advisers, Inc. a SEC Registered Investment Advisor. | 130 Springside Drive, Suite 300, Akron, OH 44333-2431 | Telephone: (800) 765-5201 | Lebel & Harriman, LLP and Lebel & Harriman Retirement Advisors are separate entities from Valmark Securities, Inc. and Valmark Advisers, Inc.