

Davidson Capital Management, Inc. Retirement Plan Highlights

- We help plan sponsors and plan participants maximize retirement savings within their retirement plan through ongoing face to face educational seminars.
- We manage and reduce the plan sponsor's fiduciary liability within their retirement plan by providing a customized fiduciary liability management process.
- We revolutionize retirement plans by being able to customize the plan design to fit the specific needs and wants of each plan sponsor.
- We are a team of professional portfolio managers who can provide specific investment advice within each participant's retirement account, unlike stock brokers or insurance agents who cannot provide this level of service.
- We actively manage the retirement plan's overall investment menu by selecting or deselecting the retirement plan's investment options.
- We follow a "Best of Breed" approach in selecting the mutual funds being offered within our retirement plans.
- We utilize a mutual fund investment menu that is comprised of no load mutual funds. This helps reduce internal mutual fund expenses faced by all the plan participants.
- We can provide the new Roth 401(k) deferral option within our retirement plan.