



Support The Needs And Goals Of Your School and University Staff

Private schools and universities without advisors on their retirement plans often don't realize how much money is being wasted on fees and impractical plan structures. Twelve Points is here to ease the burden of financial stress for schools, universities, educators, and staff.



Your dedicated resource for retirement planning and financial health

The Twelve Points team can leverage our expertise and industry connections to curate a comprehensive solution tailored to your staff's needs, both now and in the future.

- ▶ 403(b), 457(b), and 457(a) Plan Expertise
- ▶ Plan Review & Restructuring
- ▶ Contribution Matching Plan Design
- ▶ Financial Planning
- ▶ Financial Wellness
- ▶ Debt Counseling
- ▶ Life Event Savings Plans
- ▶ College Debt and Savings
- ▶ And Much More!

Access all the resources you and your staff and faculty members need to save more money, boost financial health, and take a crucial step towards finding more fulfilment in work and life.

*Recognized on NAPA's Top Advisory
Retirement Plan Firms List 2018-2022*

Freedom, Security, Integrity

Enjoy exceptional and trusted service tailored to your needs by partnering with financial experts who...

- ▶ Understand the unique challenges faced by schools, universities, and educators
- ▶ Have over a decade of collective experience in navigating all facets of retirement plans
- ▶ Can help you review and restructure your plan design to meet your participants' needs
- ▶ Provide personal service to drive smart decisions regarding financial wellness
- ▶ Curate strategies for comprehensive financial management and wellness

Talk To An Expert

Receive expert guidance and concierge-level service with all the services you need under one roof.

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