



What our clients say about RPAS

“Veronica Bray guided our college in our search for a retirement advisor for our 3 retirement plans. She advised me, as the college President, on a process for selecting a retirement plan advisor and co-fiduciary. As a result of her work, we hired an outstanding partner and now have a plan structure with more choice and an overall lower cost to our employees. The process she designed was very effective and efficient. We made a selection in a timely way and emerged with a stronger retirement program as a result of her efforts.”

“Retirement Plan Advisor Search did a search for us this year. Veronica did an excellent job. She is very organized and supported us throughout the process. It's hard to find time to do an RFP but Veronica did all of the heavy lifting and we received a detailed analysis and presentation of the RFP responses. She is knowledgeable of the providers and which provider would be a good fit for our organization. Veronica also provided us great documentation on the whole process and the finalist meetings as well as helping us review the agreement with our selected provider. She is a great resource if you need to conduct an RFP!”

“I just wrapped up a project with Veronica. I can truly say that I didn't know what I didn't know prior to engaging in the process. Veronica helped educate and lead the process of picking new partners to handle our 401k programs. She is extremely professional, knowledgeable, and friendly. Highly recommend employers get connected with Veronica to see how she can help.”

“Veronica did a fine job helping us in our RFP to select a defined contribution advisor by evaluating multiple candidates across a matrix of criteria. It was a good process with a good outcome. I recommend Veronica highly for such a project. ”

“We recently worked with Veronica to help us evaluate our existing retirement plan advisor as well as send out RFP's to various other advisors. Veronica provided a “turnkey” approach from start to finish from developing the RFP to organizing and planning the meetings with prospective advisors. She did a fabulous job with the whole process. We are very glad we could work with her and she delivered exactly what we had hoped for. I definitely recommend Veronica if you are looking to hire, evaluate or replace your retirement plan advisor.”

“The retirement plan committee at my non-profit organization had the pleasure of working with Veronica Bray while considering a potential change to our 403(b) plan's investment advisor via an RFP. She provided thoughtful leadership and insight to the process and thoroughly documented the thoughts of the committee as we considered the pros and cons of each provider. In the end we felt very comfortable choosing between 3 capable providers. Veronica was knowledgeable of the industry, offered suggestions for potential providers, identified opportunities for increased compliance and was responsive throughout the process and we are already saving on fees! We definitely feel that Veronica provided a more thorough and efficient process than we could have created on our own.”

“Veronica helped us manage our search for a 401k advisor. She provided thorough and professional materials to assist in our search and handled the legwork. We enjoyed working with her and would recommend that anyone looking for assistance with their 401k utilize her services.”