



Kelly Benefits Advisory

We are pleased to announce LifeSpan Products and Services' partnership and endorsement of Kelly Benefits Advisory as our preferred retirement plan advisor partner for LifeSpan and its members!

Kelly Benefits Advisory is a robust locally-based organization within our community, specializing in advisory services for group retirement plans. Kelly Benefits Advisory is actively engaged in developing innovative retirement plan solutions that harness the power of LifeSpan membership, for both large and small providers. This initiative aims to provide members with a unique opportunity to optimize their retirement plan offerings for employees, by leveraging a pooled program, effectively addressing plan and participant-level fees.

Kelly Benefits Advisory offers a unique, retirement-focused service experience, built upon 4 pillars of service:

- Investment Advisory & Consulting Services
- Compliance Assistance Services
- Administrative Support Services
- Employee Engagement Services

Kelly Benefits Advisory is committed to an unwavering approach to protection and time-saving efficiency through thoughtfully designed processes. KBA offers an integrated *Single Sign-On* experience, as well as plan design and management expertise that streamlines many aspects of clients' journeys. The team at Kelly Benefits Advisory possesses extensive expertise in design and plan management, empowering clients to customize retirement plans that meet their company's specific needs while safeguarding their future.

Stay tuned for exciting updates on the pooled program, and we encourage you to visit Kelly Benefits Advisory at their booth during the LifeSpan Annual Conference in September.

For more information, reach out directly to John Kelly Jr. and his team at irkelly@kellybenefits.com or 443-589-1873.
