



Retirement Plan Case Studies



ROBERT BOWDEN, INC.

Plan Types:

- 401(k)
- ESOP
- Nonqualified

Services:

- Recordkeeping
- Administration
- ESOP Consulting, Implementation, & Communication

Robert Bowden, Inc. (RBI) is a privately-held wholesale building material supply and manufacturing corporation headquartered in Marietta, Georgia. They have been delivering quality products and services to the construction professionals of the Atlanta metropolitan market since 1983.

RBI's accountants brought Swerdlin & Company in several years ago to help solve some of the service and timing issues they were experiencing with their 401(k) plan recordkeeping. As a result of the successful working relationship on the 401(k) plan, when RBI began contemplating an ESOP for their company, they brought us in right away. Knowing our expertise in the ESOP area, RBI wanted our input and advice. As one of their advisors throughout the process, the client relied on us to make sure adding an ESOP made sense and would accomplish what they intended.

Swerdlin & Company assisted in various aspects of the plan design prior to implementation, including working with the attorneys, accountants and the RBI executive team. We helped educate RBI on how the ESOP would affect their retirement program, their corporate financials, culture, etc. We assisted in 13 employee meetings to help introduce the new ESOP and communicate its impact to the employees and the effect it would have on the culture of the company.

Swerdlin's depth and experience with all types of retirement plans adds value for you!

"Not only do we receive prompt service, we appreciate the quality, in-depth advice Swerdlin provided when we added our ESOP and continue to rely on them for all our retirement plan needs."

Greg Lucas, Chief Financial Officer