

CBIZ InR Recognized as Approved Fiduciary Investment Advisor in the State of New Jersey

November 1, 2021

The firm will provide fiduciary-based investment advice for participants in the state's 457 retirement plan offerings

MEDIA, Pa.--(BUSINESS WIRE)--Nov. 1, 2021-- CBIZ InR Advisory Services, a division of [CBIZ, Inc.](#), a national leading provider of financial, insurance and advisory services, has been approved by the state of New Jersey as a Fiduciary Investment Advisor. Following an extensive review and proposal process, CBIZ InR was appointed as an approved vendor, allowing the state's 457 retirement plans the option to engage with the firm as its investment advisor.

To become approved with the state, CBIZ InR presented a program that provides economical, transparent and hands-on individual counseling for municipal employees. CBIZ InR brings an independent approach to delivering these services and remains committed to delivering a comprehensive and dynamic experience for employers and participants across the state while enhancing the level of fiduciary service provided.

"CBIZ InR is proud to be an approved retirement plan provider for the state of New Jersey," said Brad Warner, Vice President of CBIZ InR. "The state's municipal employees are incredibly hard-working individuals and they deserve quality service and comprehensive advice to manage their retirement assets and meet their financial goals."

Jeff Hugo, CBIZ InR Executive Vice President, added: "Our mission is to optimize our clients' retirement plans and we apply the same philosophy with municipal-level clients as we do with individual investors. This approach has yielded success with over 125 municipalities in Pennsylvania and Maryland, and we look forward to extending our work in the great state of New Jersey."

CBIZ InR upholds an elevated service standard and assumes fiduciary responsibility for the investments in managed portfolios. This provides investors with full transparency and confidence to navigate their retirement landscape. More information about CBIZ InR can be found at [cbiz.com](#).

Investment management services are provided through CBIZ Investment Advisory Services, LLC, a registered investment adviser and wholly owned subsidiary of CBIZ, Inc. dba CBIZ InR.

About CBIZ

CBIZ, Inc. is a leading provider of financial, insurance and advisory services to businesses throughout the United States. Financial services include accounting, tax, government health care consulting, transaction advisory, risk advisory, and valuation services. Insurance services include employee benefits consulting, retirement plan consulting, property and casualty insurance, payroll, and human capital consulting. With more than 100 Company offices in 31 states, CBIZ is one of the largest accounting and insurance brokerage providers in the U.S. For more information, visit [www.cbiz.com](#).

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Source: CBIZ, Inc.