



Craig Thompson
Registered Representative

Practice Focus

- Corporate Retirement Plan Consultant
- Employer Matching Projections
- Fund Analysis
- Compliance Consultation
- Vendor Cost and Service Comparisons

Education/Certification

- Bachelor of Arts from Stanford University
- Series 6, Series 63, Group 1 Insurance License
- Member of American Society for Pension Professionals and Actuaries

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Craig Thompson

Craig has 8 years of experience in the Financial Services Industry. Craig attended Stanford University where he graduated with a Bachelor of Arts in Economics. During his career Craig has earned a Series 6, Series 63, and Group 1 Insurance License. He has received specialized education in the field of pension consultation and 401k administration.

Craig is driven to help plan participants meet their retirement goals. He is also committed to measuring the costs, administrative services, and value-added benefits that will help build a successful retirement plan. His impartial assessment of each client's retirement plan (as part of the sum of all employee benefits) helps ensure that the employer's goals are met as well. He earnestly researches the market to find the appropriate plan design, investment provider, and administrators for each employer based on their specific needs. Craig facilitates the relationship between the plan sponsors and plan administrators by providing pertinent information regarding legislative changes, plan costs, fund performance, and plan design to both the employer and the employees.