Retirement Plan Consulting

For Employer-Sponsored 401(k) or 403(b) Plans

Faubourg Private Wealth is a locally-owned wealth management firm rooted in the Gulf Coast, built from the ground up to take care of people like you. We're boutique enough to know you by name yet are partnered with leading financial institutions.

Three offices, Metairie, Covington, and Hammond, serving clients across the nation

A unique mix of seasoned expertise and innovative ideas

Comprehensive financial planning and investment services tailored to your needs

Why choose Faubourg?

Your future is our purpose. Too often, you are stuck with generic solutions or advisors who are more loyal to big corporations than to the people they serve. We zig when others zag because we're not beholden to anyone but you. Our independence means we are free from quotas or proprietary products and always act in your best interest. Our focus stays on you.

A multigenerational approach ensures your plan doesn't just work today but for your kids and grandkids, too.

We are a team that isn't just about credentials (though we've got those in spades); we're real people who genuinely care about making a difference in your life.

We coordinate with your attorneys, CPAs, and other advisors as your central hub.

Your retirement plan. Our purpose.

When it comes to your employer-sponsored retirement plan, you deserve a personalized, concierge-level experience, free from proprietary restrictions. Whether you're looking to start a new company plan for you and your employees or enhance your current one, we'll help you build a solution that aligns with your goals.

For plan sponsors:

Our team provides end-to-end retirement plan consulting and works closely with you to develop future-focused, differentiated plans.

We offer:

- 3(38) and 3(21) Fiduciary services, support, and education
- Plan design and compliance assistance
- Plan administration support services
- Assistance in correcting non-compliant plans
- Investment due diligence
- Provider analysis and benchmarking
- Cash balance and profit sharing

For plan participants:

Our goal is to empower your employees with the tools, guidance, and confidence they need to plan for a successful financial future.

We offer:

- Onsite financial and wellness education
- One-on-one support from our advisory team
- Opportunities to transition to a full private wealth management relationship into retirement

Collaborating with trusted providers

We work with a curated network of providers, including but not limited to those listed here, to ensure every aspect of your employer's retirement plan is supported with care and precision.

Discover how our partnership can support your goals.

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