The Team Approach to Total Client Service for Retirement Plans

PENSION ATTORNEY
- Plan Design & Documentation
- Representation before IRS for Determination Letters, Audits, Remediation, etc.
- Semi-Annual Consultation with client re: ownership changes, demographics, profits & cash flow
- Annual Discrimination Testing & Contribution Consulting
- Interface between client, broker & CPA
- Annual reminder to Broker to review investment policy
- Annual contact with CPA to confirm deductions

THIRD PARTY ADMINISTRATOR (TPA)
- Reporting (5500)
- Disclosure (SARs)
- Distributions & Loans
- Account Records
- Vesting
- Client Support

ACCOUNTANT
- Tax Consulting
- Income Statements
- Corporate & Personal Returns
- Cash Flow Analysis
- Trusted Business Advisor

EMPLOYER-SPONSOR

RETIREMENT PLAN

BROKER/RIA
- Investment Selection
- Investment Monitoring
- Participant Education
- Personal Financial Planning
- Interface with Financial Institution

OTHER ADVISORS
- Corporate Attorney
- Estate Planning Attorney
- Business Consultant
- Banker
- Casualty/Health Insurance

FINANCIAL INSTITUTION (OR PLATFORM)
- Wholesaler support
- Investments
- Account Statements
- Marketing & Client support services

ACTUARY
- DB Plan Funding
- Schedule B

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TAX-ADVANTAGED RETIREMENT PLAN DESIGN & CONSULTING