

# CREATING CUSTOM RETIREMENT PLANS FOR YOUR UNIQUE COMPANY



Shaping your plan design to meet the specific needs of your business.

Every company is different. Which is why we work closely with our clients to make sure their retirement plan is customized to the unique goals of their business.

We provide comprehensive plan design consulting and administrative services for many types of retirement plans including:

**401(k)**

**Profit Sharing**

**Cash Balance**

**Defined Benefit**

# PREMIER PLAN CONSULTANTS OVERVIEW OF RETIREMENT PLAN SERVICES



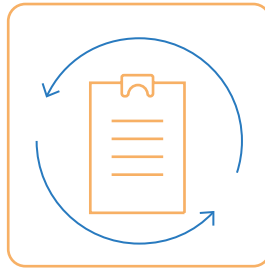
## CONSULTING

Identify and understand your company's retirement plan objectives

Create a custom plan design that can maximize benefits and retirement outcomes

Prioritize your needs and offer straightforward advice

Provide consistent and accurate consulting



## ON-GOING SUPPORT

Be a knowledgeable resource for technical retirement plan questions

Provide simple, easy to understand answers

Ensure your customized plan design continues to meet your needs as your business evolves



## COMPLIANCE

Design and prepare Plan Document and Summary Plan Description

Ensure your plan is in compliance with current regulations

Perform all required annual trust accounting and testing

Prepare Form 5500 and all required schedules

## To get started, let us help.

There are a variety of ways to design a 401(k) Plan to meet your company's specific needs. We are intimately familiar with the types of plan options available today. We begin our process with a conversation to understand your business goals. Then, we present custom plan illustrations to demonstrate the different options available. We work side-by-side with our clients to provide information they find valuable and easy to understand. To answer questions about your plan options, we are happy to discuss how we can design a company sponsored plan that meets your specific retirement plan goals.



PREMIER PLAN CONSULTANTS

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