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## MEDIA KIT: PRODUCTS & SERVICES



### PRODUCTS:

- 401(k)
- Roth 401(k)
- Safe Harbor 401(k)
- 457
- 403(b)
- Profit Sharing Plans
- New Comparability / Aged Based
- Defined Benefit
- Cash Balance
- ESOP
- Money Purchase Pension
- Non-Qualified Deferred Compensation
- Permitted Disparity

### PLAN DOCUMENT SUPPORT:

- Prototype plan documents
- Volume submitter plan documents
- 403(b) plan documents
- Nonqualified plan documents (deferred comp, 457)
- Adoption agreements
- Summary Plan Descriptions (SPD)
- IRS filing
- Plan amendment services
- Plan restatement services
- Document review
- Document mapping services
- Consulting on default provisions/ common elections

### RECORDKEEPING SYSTEM:

- 24/7 Web and toll free account access
- Multiple fund families
- Self directed brokerage accounts
- Asset allocation models
- Multiple contribution sources
- Automated tracking of eligibility
- Multiple vesting schedules between sources
- Daily valuation of participant accounts
- Quarterly participant account statements
- Quarterly administrator's report
- On-demand ad hoc advisor and plan sponsor reporting options

### ONGOING ADMINISTRATIVE SERVICES:

- Dedicated single point-of-contact for advisors and plan sponsor
- Client and participant services Available Representatives (M - F 8 a.m. - 8 p.m. EST)
- Foreign language support (representative assistance)
- QNEC calculations
- QMAC calculations
- Signature Ready 5500
- Year end compliance testing
- Participant loan administration
- Participant distributions
- Tax withholding and reporting
- Comprehensive administrative guide
- Trustee services available
- Customer service guarantee

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