



# Third Party Administration

## Fully Customizable Solutions



## Objective Approach



## Personal Service



## In-House Actuaries



## Bilingual English/Spanish

### Plan Success Without All The Stress

For most small to mid-sized firms, retirement benefit plan administration is an unpleasant distraction: time-consuming, worrisome and risk-filled. Operating an appealing and rewarding retirement plan for your business and its participants requires thoughtful plan design, appropriate benefit levels, effective participant communication, and a working knowledge of constantly shifting compliance and filing requirements.

### Comprehensive Knowledge & Expert Guidance

At Retirement Solution Group, LLC, we eliminate the complexity, delivering the comprehensive knowledge and expert guidance your firm needs to successfully design & navigate customized plans, from maximizing deductions to avoiding mandatory refunds.



### Meet Your Plan Goals & Limit Your Fiduciary Liability

We're entirely dedicated to retirement plan services and currently manage over 250 qualified plans. Our only interest is helping our clients to successfully address the myriad of fiduciary and compliance regulations facing plans today. From Plan Document Set-Up to annual enrollments, we partner with you to meet your plan goals:

- Helping business owners and key employees maximize their deductions
- Guiding you through discrimination testing and annual refund procedures
- Satisfying Rule 404C, perhaps the least understood provision in ERISA
- Successfully implementing mandatory and optional IRS mandates
- Preparing and filing Form 5500 and related filings
- Assisting you in attracting and retaining key employees

Knowledge + Service + Commitment = RSG



## R E T I R E M E N T   S O L U T I O N   G R O U P ,   L L C

### Stress-Free Third Party Administration

RSG can be your light in the dark, helping you and your plan Trustees to reduce the stress, concerns and risks associated with managing a retirement benefit plan. We understand that small to mid-sized plans face a unique set of challenges. We help you to eliminate the guesswork, keeping your plan on track, aligned with your objectives, and in full compliance.

Our administration services include:

- Compliance support
- 5500 and supporting tax filings
- Discrimination and other applicable compliance testing
- Contribution allocations
- Annual record keeping for Trustee-directed plans
- Actuarial services
- Actuarial valuations
- Plan Document creation and management
- Implement IRS optional and mandatory updates

Please call us today. We'd love to demonstrate how our TPA services can help make your retirement plan benefits feel like benefits again!

### About Retirement Solution Group

Retirement Solution Group, LLC, is a retirement benefits consulting practice specializing in all aspects of qualified plan support for small to mid-sized companies.

Blending our large plan experience (Boeing, Kodak, Chevron, and 3Com) with our consulting services background (Ernst & Young, Deloitte & Touche, and the Fusion Group), we're uniquely equipped to meet the needs of small to mid-size retirement plan Trustees.

We work with you to determine an appropriate service model, utilizing full fee disclosure, for services ranging from specific project work to full service program design, support and administration.



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