

Third Party Plan Administrator

As a Third Party Plan Administrator, Pension Planning Consultants assists the Plan Administrator in fulfilling its duties required under the terms of the plan. As a Third Party Plan Administrator, we typically provide services which include, but are not necessarily limited to, designing, producing, amending and restating plan documents; aiding in the transition (if applicable) from the plan's current investment platform to a newly selected investment platform; preparing employer and employee benefit statements; assisting in processing all types of distributions from the plan; preparing loan paperwork for plan participant and trustee(s) execution; testing the plan each year to gauge its compliance with all IRS non-discrimination requirements as well as plan and participant contribution limits; allocation of employer contributions and forfeitures; calculating participant vested percentages; preparing annual returns and reports required by the IRS (including Form 5500), DOL or other government agencies and other duties as required by the employer.

Contact us Today

(888) 880-1283

(Toll Free)