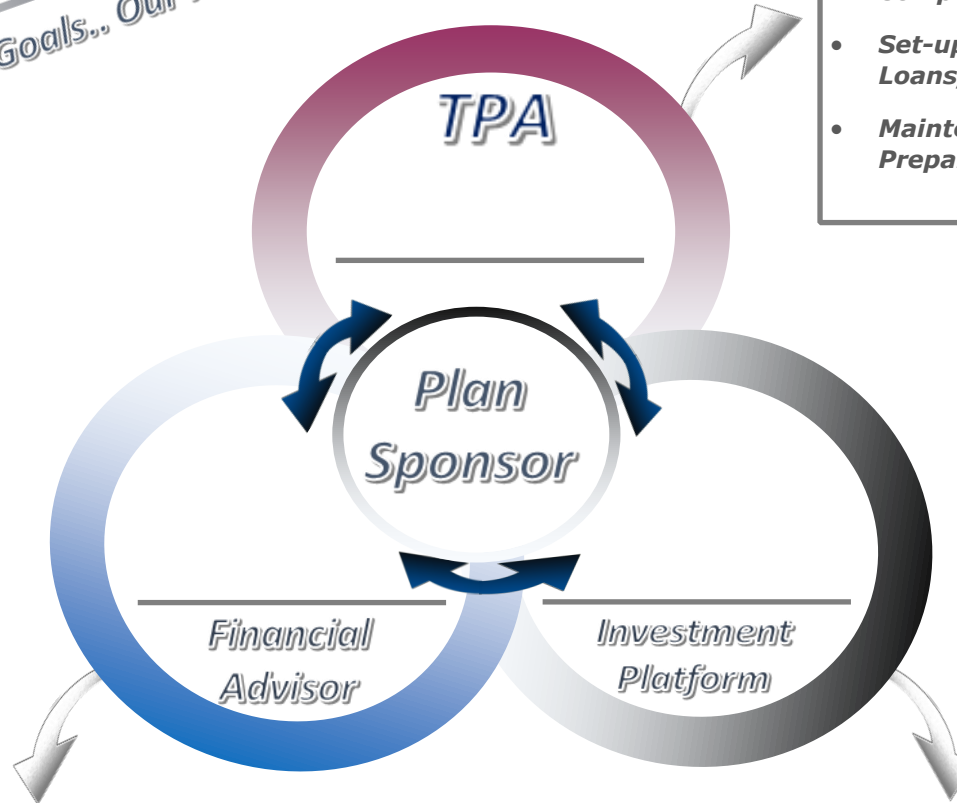


3-Leg Stool

Your Team.. Your Goals.. Our Focus

Plan Sponsor:

- Upload Payroll Contributions
- Provide Accurate Year-End Census Data
- Sign/Date all Docs, Forms & 5500s
- Distribute Employee Communications



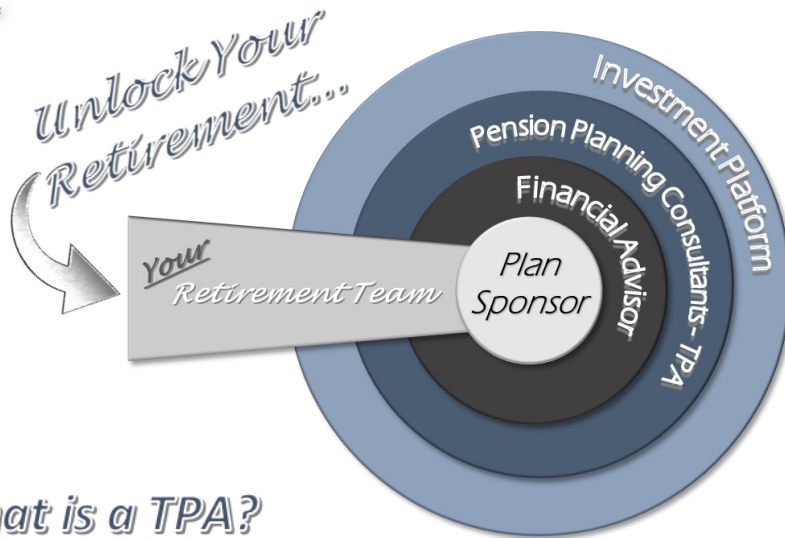
- Plan Design and Consulting on Employer Funding Allocation
- Full Administration & Government Compliance Testing
- Set-up, Approval & Amortization of Loans; Distribution Execution
- Maintenance of Plan Documents & Preparation of Annual Notices

Notes:

- Advice/Guidance on Investments Available to the Plan
- Ongoing Monitoring of Investments
- Participant Advice/Guidance & Enrollment Coordination
- Coordination of Service Provider Reviews
- Fiduciary Best Practices for Employer

- Offers Investment Options for Plan & Individual Employees
- Daily Valuation of Investments
- Accounting of Participant's Assets by Source
- Employer/Employee Websites; Access to Information & Tools
- Provides new Fee Disclosure Information (408b2 & 404a5)





What is a TPA?

An independent partner... A Third Party Administrator is an integral part of any retirement plan. PPC works alongside your CFP/ Financial Advisor, your CPA, & the Investment Platform you choose to ensure compliance and keep your retirement plan on track. We are the experts who can design the right framework for your plan and implement your goals. *Retirement Team...*

We perform all of the government & compliance testing with our 5 on-staff Actuaries, seasoned Plan Administrators, our licensed on-staff CPA, and team of skilled professionals who are experts in their field... *We keep you on Track...*

401(k) Plans	Deferred Comp Plans
Profit Sharing Plans	457 Plans
Cash Balance Plans	403(b) Plans
DB Plans	Non - Qualified Plans



In today's business climate, it has never been more important to have a knowledgeable, experienced, and proactive partner to help protect you and your business from upcoming regulatory changes, mandates, and potential liabilities.

Since 1971, Pension Planning Consultants (PPC) has strived to provide our clients with the highest level of customer service, transparency, and protection possible.

Government Regulations may change...

...our Dedication to our Clients never will

Our employees are currently serving more than 2,000 clients across the United States. Pension Planning Consultants (PPC), Inc. provides impartial options, advice and recommendations for virtually the entire range of employee benefit plans.

Contact us Today...



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Business Development Consultant
Pension Planning - DFW Team

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