

Pension Planning Consultants

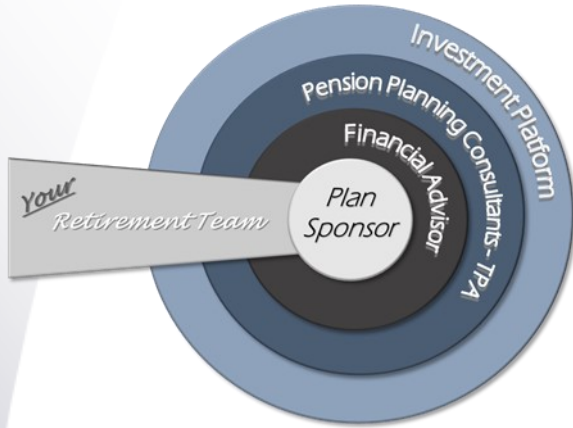
Plan Compliance & Administration Services

An independent partner... A Third Party Administrator is an integral part of any retirement plan. PPC works alongside your CPA, Financial Advisor & 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, provide real solutions and implement your goals. **Your Retirement Team...**

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

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



*Thanks for
Choosing PPC*

Plan Administration Services

When you have Questions - PPC has the answers

- Control Group Analysis*
- Affiliated Service Group Analysis*
- Customized Plan Document*
- Customized Plan Design*
- Customizing Employer Profit Sharing Contributions for Tax Savings & Plan Goals*
- Annual Census scrubbing & correction*
- Annual Reconciliation of contributions & Participant Accounts against Payroll (W-2s)*
- Annual Trust Accounting*
- Help with Annual CPA audit **
- Plan Sponsor Support with IRS and/or DOL Audit*
- Help with Annual Distributions to reduce # of Terminated Participant Account Balances*
- All Required Compliance Testing*
- Process Review to comply with DOL Requirements*
- Annual Reporting including Form 5500 & Related Schedules*



**Annual audit is required if the retirement plan is deemed a 'large' plan by governmental standards.*

PPC is not an Investment Advisor or provide Investment Advice