

How We Help You

Your Retirement Plan To Do List Today

- Act as Named Plan Administrator
- Take on Fiduciary Liability for Operating the Plan According to the Terms of the Plan
- Choose Recordkeeper
- Provide Timely, Complete & Accurate Payroll and Other Census Data
- Make Timely Contributions
- Sign and File Form 5500
- Operational Compliance
- Oversee Plan Document
- Interpret Plan Provisions
- Review Summary Plan Description (SPD) & Summary Material Modification (SMM)
- Review Required Plan Amendments
- Review Optional Plan Amendments
- Review Participant Notices
- Review Summary Annual Report (SAR)
- Review and Approve/Deny Loan Requests
- Review and Approve/Deny Home Loan Requests
- Review and Approve/Deny Hardship Withdrawals
- Review Distribution Requests
- Review Qualified Domestic Relations Orders (QDROs)
- Participant Fee Disclosure
- Service Provider Fee Disclosure
- Review Census Information
- Review Compliance Testing
- Verify Eligibility
- Verify Vesting
- Respond to Notices of Claims & Appeals
- Review Force-outs

Your Retirement Plan To Do List With Pentegra

- Provide Timely, Complete & Accurate Data
- Make Timely Contributions
- Monitor Service Provider(s)

