

Pentegra Fiduciary Connection



Improve plan outcomes with retirement plan fiduciary oversight.

Running a retirement plan can take time and resources away from running your business.

With Fiduciary Connection we shoulder the work and take on the responsibility.

Our services reduce plan workloads, save time and minimize retirement plan risks and responsibilities. It's seamless. Our services are layered on to your existing relationships with your plan's recordkeeper and advisor with no disruption.



- Plan design & document support
- Plan compliance support
- Audit support
- Plan administration
- Annual plan calculations
- Annual Government filings, including signing Form 5500 and Form 8955
- Annual notices (including mailings)
- Annual limit monitoring
- 3(16) fiduciary oversight
- Legislative updates

Fiduciary Connection Key Benefits

For Your Business	For Your Plan	For Your Participants
<p>Shift the fiduciary risk and responsibility you assume as plan sponsor to an actual fiduciary expert.</p> <p>Achieve organizational cost and benefit objectives with a consultative approach to plan design aligned with fiduciary best practices.</p>	<p>Deliver compliance confidence by ensuring your plan is current with changing legislative and regulatory developments.</p> <p>Minimize risk and liabilities associated with plan fiduciary obligations.</p> <p>Reduce administrative burdens by outsourcing time-consuming plan tasks.</p>	<p>Increase participant satisfaction through our partnership with your plan recordkeeper to help deliver an optimal retirement experience and improved plan metrics.</p> <p>Improve plan outcomes with a best-in-class approach to offering a retirement plan.</p>

The Pentegra Difference

Pentegra is a leading provider of retirement plan and fiduciary outsourcing solutions to clients nationwide. With every opportunity, our goal is to create retirement plans that run with less risk, greater efficiencies, and improved outcomes.

A Fiduciary First



As a 402(a) Named Fiduciary, we hold ourselves to the highest standard of ERISA, for a higher level of care.

An Independent Perspective



As an independent fiduciary, we bring complete objectivity and impartiality to our work, resulting in greater plan governance and oversight.

CEFEX Certified for a Higher Standard of Care



Pentegra is one of an elite group of CEFEX certified Third Party Administrators, demonstrating a standard of excellence and a commitment to industry best practices.

Eight Decades of Expertise



An 80+ year legacy serving as an institutional fiduciary delivers an unmatched level of expertise.

A Higher Level of Responsibility



As a fiduciary, we provide expert oversight and in-depth knowledge, shouldering much of the work and legal responsibility for managing a retirement plan.

Compliance Confidence



Clients enjoy the confidence and peace of mind a professional on board provides.



Over **8 decades** built serving as an institutional fiduciary



More than **\$30 billion** in assets under administration



Serving more than **65,000** retirement plans and millions of participants nationwide



Over **25,000** new clients chose Pentegra over the last two years



More than **1,000 403(b)** plans

Learn more about Fiduciary Connection

Contact us at 855-549-6689

www.pentegra.com

<https://316fiduciaryday.com/>

