

Pentegra's Solutions

Pentegra's fiduciary and third party administrator (TPA) solutions reduce plan workloads, save time, and minimize retirement plan risks and responsibilities. You'll have the assurance of knowing your plan is well designed and well managed for compliance confidence. You choose the level of services that are right for your plan.

Pentegra's Solutions			
Multiple Employer Plan (MEP)	Lifetime Fiduciary Solution	Fiduciary Connection	TPA Core Services
<p>Program Features</p> <ul style="list-style-type: none"> Plan design & document support Plan compliance support Legal support Plan administration Annual plan calculations Annual Government filings, including signing Form 5500 Plan design review & recommendations Legislative updates Designed for current or prospective member of state association (higher education or k-12) Interested in working with an investment fiduciary Interested in offering onsite participant education 	<p>Program Features</p> <ul style="list-style-type: none"> Plan design & document support Plan compliance support Legal support Plan administration Annual plan calculations Annual Government filings, including signing Form 5500 Plan design review & recommendations Legislative updates Investment fiduciary selects plan investment menu Virtual participant education services 	<p>Program Features</p> <ul style="list-style-type: none"> Plan design & document support Plan compliance support Legal support Plan administration Annual plan calculations Annual Government filings, including signing Form 5500 Plan design review & recommendations Legislative updates 	<p>Program Features</p> <ul style="list-style-type: none"> Plan Document support, including amendments and restatements Plan administration Preparation of annual Government filings Preparation of nondiscrimination testing along with any additional compliance related testing Plan audit assistance Legislative updates
<p>Key Benefits</p> <ul style="list-style-type: none"> Saves time and reduces workloads Relieve administrative and investment responsibilities Proactive monitoring Greater oversight Reduced fiduciary risk Reduces compliance burdens Seamless Integration 	<p>Key Benefits</p> <ul style="list-style-type: none"> Saves time and reduces workloads Relieve administrative responsibilities Proactive monitoring Greater oversight Reduced fiduciary risk Reduced compliance burdens Seamless Integration 	<p>Key Benefits</p> <ul style="list-style-type: none"> Saves time and reduces workloads Relieve administrative responsibilities Proactive monitoring Greater oversight Reduced fiduciary risk Reduced compliance burdens Seamless Integration 	<p>Key Benefits</p> <ul style="list-style-type: none"> Saves time and reduces workloads Relieves some administrative responsibilities Reduced compliance burdens Seamless Integration

Learn more about Pentegra's fiduciary & TPA solutions.

Contact us at 855-549-6689

www.pentegra.com

<https://316fiduciaryday.com/>

