



United Retirement Plan Consultants

National network. Local experts.

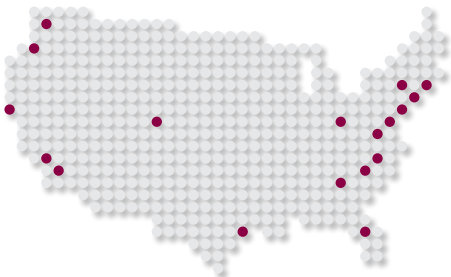
Comprehensive Services

Our **national credentialed experts** maximize your retirement savings opportunities and minimize taxes. Through technical knowledge of IRS and DOL regulations, we develop **meaningful solutions** for our clients and their plans.



Installation and base annual administration services include:

- Plan design consultation
- Document preparation (e.g. signature-ready plan document and Summary Plan Description)
- DOL Form 5500 preparation
- Annual forfeiture allocation
- Summary Annual Reports
- One annual ADP/ACP discrimination test per plan year based on prior year testing method
- Calculate safe harbor contribution, if applicable
- IRC 402(g) excess deferrals test
- IRC 410(b) ratio percentage test
- IRC 416 top heavy test
- IRC 401(a)(17) compensation limitation test
- IRC 404(a) deductibility test
- IRC 415 excess additions test on respective plan
- Annual participant vesting report/upload



Contact your local Sales Consultant or our Sales Support team for plan design consultation, illustrations, fee quotes and proposals.
SalesSupport@UnitedRetirement.com • (855) 439-6709

www.UnitedRetirement.com