



United Retirement Plan Consultants

National network. Local experts.

Plan sponsors—Take a closer look at your retirement plan.

The IRS can disqualify a plan based on certain failures, and in some instances, the business owner, plan trustee, or other fiduciary may be held personally and financially responsible. Let URPC review your plan to evaluate if it meets your compliance obligations.

Plan design

	Yes	No	Maybe/Don't know
Are owners able to contribute as much as they would like to the plan?			
Are company contributions benefiting the right people, as intended by management?			
Are highly paid employees'/owners' contributions limited by ADP nondiscrimination test results?			
Does the plan operate smoothly from an administration standpoint?			
Is the plan meeting all of the business objectives?			

Administration service

Do you have a dedicated contact that you can call with questions about the plan?			
Are you able to get answers when you need them?			

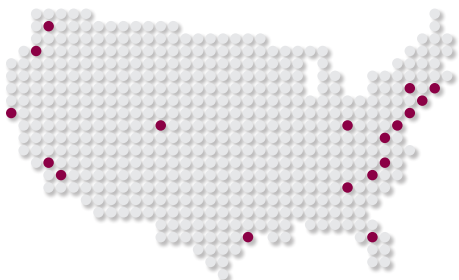
Fiduciary responsibility

Do you know the fees you pay for compliance, administration, recordkeeping and investments services?			
Have you benchmarked the above fees or completed an RFP to determine reasonableness?			
Do you have confidence in the cost and diversification of the investment lineup?			
Do you and your investment advisor review the plan investments periodically and document the meeting?			
Do participants have ready access to a qualified investment advisor?			
Do you maintain an investment policy statement?			

How did your plan measure up?

If you checked one or more yellow boxes, then you may not be receiving the service you deserve. If you checked one or more red boxes, then you may have certain fiduciary obligations or regulatory matters to consider.

URPC can help. We leverage our national resources with local service to deliver best-in-class retirement plan solutions. Contact us today for a personalized proposal.



Your goals for tomorrow drive choices today.

Contact us for plan design consultation, illustrations and proposals.
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www.UnitedRetirement.com