Retirement Plan Administration & Planning

RETIREMENT PLAN ADMINISTRATION & PLANNING SERVICES

RETIREMENT PLANS CURRENTLY MANAGED BY SEK

SPECIALIZED DESIGNATIONS HELD BY TEAM MEMBERS

OPTIMIZE YOUR EMPLOYEE BENEFITS WITH EXPERT RETIREMENT PLAN GUIDANCE

Offering a well-designed, properly administered retirement plan is one of the most effective ways to attract and retain top talent—yet it can be one of the most complex compliance obligations a business faces. SEK's retirement plan specialists provide the knowledge and guidance you need to optimize your employee benefits while managing risk and keeping costs in check.

Third-Party Administration (TPA)

SEK provides comprehensive TPA services for Traditional, Roth, and Safe Harbor 401(k) plans, Profit-sharing plans, 403(b) plans for tax-exempt organizations, Governmental money purchase and 457 plans. Our team handles all administrative tasks—from plan design and implementation to annual compliance testing, Form 5500 preparation, and participant communication.

Plan Design & Implementation

The right plan design depends on your workforce, your cash flow, and your goals. We help you evaluate plan types, contribution structures, vesting schedules, and plan features to build a retirement benefit that works for your business and your employees.

Annual Administration

Ongoing plan administration requires meticulous attention to detail. Our team manages contribution tracking, loan processing, distribution requests, required minimum distributions, annual nondiscrimination testing, and all required government filings.

Consulting

Whether you're evaluating a plan for the first time or looking to improve an existing plan, our retirement plan consultants provide objective guidance on plan selection, vendor evaluation, and regulatory compliance.

Individual Retirement Planning

SEK's professionals work with individuals to develop personalized retirement income strategies that maximize available tax incentives and ensure long-term financial security.

TEAM LEADERS

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UNMATCHED CLIENT BENEFITS

At SEK, our Retirement Plans team specializes in designing customized retirement plans that go beyond expectations in both value and performance. We create solutions tailored to your specific needs and ensure that your plan meets the highest standards.

We are committed to maintaining our independence. At SEK, we don’t sell investment products. Instead, we collaborate with your financial advisors to identify investment strategies that align best with your plan’s goals, ensuring unbiased and effective planning.

Our CPA-led team is deeply knowledgeable about the tax advantages of retirement plans. We work to help business owners maximize deductions while enabling participants to grow their retirement savings in the most tax-efficient way possible.

DESIGN A SUCCESSFUL FUTURE

With our deep understanding of the intricacies of retirement plans and a client-first approach, we provide the knowledge and guidance you need to optimize your employee benefits. If you’re ready for a strategic partnership that will help you achieve your goals, contact us to get started.