Third Party Administration - Retirement Plans

OUR SERVICES

- Plan design and implementation
- Plan document review
- Tracking legislative changes
- Nondiscrimination testing
- Contribution calculations
- Employee communication
- Day-to-day third-party administration
- Trust accounting
- Vesting calculations
- 5500 preparation
- Representation regarding IRS and DOL issues

OUR AREAS OF EXPERTISE

- 401(k) plans – Traditional, Roth, Safe Harbor
- Profit sharing plans
- 403(b) plans
- Governmental – money purchase, 457 plans

HOW OUR CLIENTS BENEFIT

Customized Plans

Finding a balance between cost and value is essential when designing a retirement plan. We currently administer over 400 retirement plans. Trust our knowledgeable and experienced team to design a plan to fit your needs and objectives.

Commitment to Independence

SEK does not sell investment products. We work with clients' financial advisors who will find investment vehicles that best suit their needs.

Tax Advantaged Savings

Our CPA-led team understands the tax and audit implications related to retirement plans. Our team can maximize tax deductions for business owners and retirement savings for plan participants.

RESOURCES

TEAM LEADERS

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- Download our summary of plan provisions that should be consideredwhen choosing a retirement plan for your company. In choosing a plan,you should weigh the benefits of flexibility and increased contribution levels versus the ease and lower cost to administer.

Retirement Plans at a Glance

- Download our summary and comparison of the four tax credits that were created or enhanced with the passing of the SECURE 2.0 legislation:
  - Start-Up Administrative Costs
  - Employer Contributions
  - Automatic Enrollment
  - Military Spouses

Retirement Plan Tax Credits

Visit www.sek.com for more information or to schedule a consultation today!