



PENTEGRA
RETIREMENT SERVICES

RETIREMENT PLANS

DESIGNED BY PENTEGRA RETIREMENT SERVICES
FOR MORE THAN 65 YEARS

In the complex world of retirement plans there is no “one size fits all” solution. Every client’s needs are different. That’s why Pentegra offers clients a highly consultative approach to retirement plan management. With the benefit of over six decades of industry knowledge and insights in designing retirement programs for financial institutions nationwide, Pentegra Retirement Services delivers an unparalleled advantage.



Our comprehensive approach to plan consulting results in a retirement program that meets your benefit and cost objectives, maximizes efficiencies, streamlines administration and provides participants with a better understanding and appreciation of their retirement benefits package.



PLAN DESIGN

At Pentegra designing an effective retirement program for your organization begins with your plan consultant. We approach plan design, whether it's an existing plan or a new plan, by first learning more about your business, your employees and your objectives.

PLAN MANAGEMENT

Our consultants extend their focus beyond plan design and continue to work with you as a true partner, identifying your needs and tapping into in-house technical resources. We provide guidance and support with respect to regulatory and legislative issues that may affect your program and recommend ongoing measures to keep your plan in compliance with ERISA, IRS, DOL and PBGC regulations.

PLAN EDUCATION

Our integrated approach to plan consulting and education provides your participants with a comprehensive view of their retirement program to help build a greater appreciation for the valuable benefits you provide.

MERGER & ACQUISITION CONSULTING SERVICES

- Strategic analysis in the event of a change in corporate structure
- Analysis of both programs to determine appropriate benefit levels and replacement ratios
- Comprehensive retirement plan review in conjunction with business goals and benefits philosophy
- Peer analysis and competitive considerations
- Plan amendments and document modifications
- Regulatory and legislative technical guidance
- Ongoing plan design consulting



CREATING SOLUTIONS THROUGH PARTNERSHIPS.™

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