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Small Business. Big Savings.

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Key Areas of Retirement Plan Optimization



Administration

- Sophisticated plan design
- Payroll-Integrated Transaction options
- One robust interface or technology
- Testing and tax filing
- Signature Ready Form 5500 Preparation and Review
- Cash Balance can be life-changing and simple to install and administer



Investments

- Plan Advisor 3(38)
- Investment Advisor
- Charles Schwab Custody & Trading
- Model Management by Charles Schwab
- Open Architecture
- Investment Neutrality



Fiduciary Responsibility & Compliance

- Employee Education
- Portfolio Management
- Administration of Plan in Accordance with Plan Provisions
- DOL/ERISA Compliance
- Fee Transparency



Plan Design

- Safe Harbor Plans
- New Comparability Profit Sharing
- Roth Option
- Auto Enrollment
- Cash Balance



Participant Retirement Readiness

- Quarterly Education & live 1:1 Enrollment Meetings
- Calculators for Net Pay, Savings Rate, and Gap Analysis
- Two Rebalance dedicated advice & service team members
- 24/7 Control and Access – Web, Mobile, and Phone
- Access to Library of Whitepapers



Total Plan Costs

- Complimentary Annual Plan Benchmark
- Recordkeeping and Administration
- Investment Management
- Financial Advisor



Partner with a Leader

Preparing your employees for retirement is complex. At Rebalance, our firm manages over \$1.2 billion of client assets, and we have extensive experience guiding companies through all types of compliance and regulatory issues. With Rebalance as your partner, you will benefit from one-on-one dedicated service, backed by leading technology, to ease the complexity and fiduciary aspects of your plan.

Preparing You for What Lies Ahead

Ease Complexity

Minimize your workload and reduce your risk. Let us manage the details and guide you through fiduciary responsibilities.

- Bundled recordkeeping and admin
- Automated, integrated transactions
- Compliance testing and more

Plan Flexibility

You want choices to tailor your plan. We offer you more ways to optimize it.

- Employer match encourages retention
- Auto enrollment increases participation
- Safe Harbor passes most compliance testing
- Profit Sharing
- Cash Balance for up to 4x tax deductions
- Roth 401(k) accounts
- Non-profit – 403(b) and 457 plans
- Personal investment and wealth management

White Glove Service

Initially developed for our wealth clients, our service team assigns each client a professional to help you:

- Convert and onboard the plan
- Work with participants and payroll company
- Proactively schedule plan review meetings
- Help your staff with investing

Let's Connect



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