

# Schneider Downs 401(k) Solutions 401(k) plans simplified. By design.

For many businesses, a popular benefit for employees has turned into a cumbersome burden for employers. At Schneider Downs, we believe you shouldn't have to be a 401(k) expert to offer an expertly managed 401(k) plan.



## An investment in service.

A big part of simplifying 401(k) plans is delivering world-class support for everything associated with your plan. We don't outsource any of our services. Our one-stop, in-house, cost-effective, hands-on approach means you don't have to call different vendors for different issues. We are an ideal partner for any business, since you can tap into all our various services and offerings, including:

**Investment Advisory** – We offer a wide range of investment choices for participants to consider for a variety of goals and stages in life. With low-cost mutual funds, including target date allocations to simplify saving for retirement, our investment advisory services are not beholden to any fund family. This allows us to offer only those funds we feel are run by experienced management teams and that are a good fit for your plan and employees.

**Third-Party Administration (TPA)** – We are diligent in keeping your 401(k) plan compliant with ERISA laws, including all the required paperwork, forms, testing and reporting.

**Recordkeeping** – This service involves the accurate and meticulous processing of trades, transferring and reallocating of investment balances, recording contributions and distributions, and making sure employee balances are updated daily.

## A benefit for employers.

Schneider Downs' expertise solves many of the problems that come with offering a 401(k) plan. Our deep experience with the ever-changing rules and laws governing retirement plans means we can assist with the fiduciary and legal responsibilities that come with offering a 401(k) plan. Plus, our accessible, high-touch approach can help you educate your employees about their options.

## A single 401(k) source for a variety of 401(k) services.



Every service related to offering a plan



Large and small businesses



New or existing 401(k) plans



Customized plans



Seamless, personalized service from senior professionals

If you're ready to learn about all the ways we can make offering a 401(k) plan easier and more efficient, please contact Jason Lumpkin, Shareholder at 412-697-5472, or [jlumpkin@schneiderdowns.com](mailto:jlumpkin@schneiderdowns.com).



Schneider Downs & Co. Inc. (Schneider Downs) is one of the largest accounting and business advisory firms in Western Pennsylvania and Central Ohio. Since 1956, Schneider Downs has provided a full complement of accounting, tax, business advisory, wealth management and corporate finance services to private and public companies, nonprofit organizations and individuals throughout the world. Learn more at [www.schneiderdowns.com](http://www.schneiderdowns.com).

\*Investment advisory services provided by Schneider Downs Wealth Management Advisors, LP

\*\*Recordkeeping, Consulting, and Compliance services provided by SDAvantage Retirement Solutions, LP