



Schneider Downs Retirement Solutions (SDRS) provides cohesive and comprehensive retirement plan solutions customized to meet the individual needs of employers and employees.

Retirement Services Offerings

Whether you are offering a traditional retirement plan or require specialized compensation and benefit programs for executives, our team of advisors and consultants have the expertise and experience to assist with any retirement plan need, including:

401(k) & 403(b) Solutions

- » Fiduciary Best Practices
- » Investment Advisory*
- » Participant Advice and Education*
- » Plan Design and Documentation
- » Recordkeeping with Mobile App
- » Third-Party Administration

ESOP Solutions

- » Feasibility Analysis
- » Compliance and Reporting
- » Distribution Obligation Analysis
- » Plan Design and Documentation

Executive Compensation Solutions

- » 415 Excess Plans
- » 457(f) and 457(b) Plans
- » Phantom Equity Arrangements
- » Restricted Stock Plans
- » SERPs
- » Stock Appreciation Rights

** Investment advisory services are provided by Schneider Downs Wealth Management Advisors, L.P., an SEC Registered Investment Advisory Firm.*

SD Retirement Solutions Consulting

Our team of retirement plan consultants are experts in plan design and administrative operations to ensure your plan remains compliant and achieves the goals that you have established. Consulting services include:

- » Compensation Studies
- » Comprehensive Plan Reviews
- » Health & Welfare Plan Consulting
- » Plan Administration Best Practices
- » Plan Corrections
- » Plan Governance
- » Regulatory Guidance
- » RFP Assistance

About Us

The Schneider Downs Retirement Solutions team provides customized solutions, coordinating a range of service offerings, including: ERISA expertise, investment advisory services, employee education, recordkeeping, third-party administration, and holistic retirement plan compliance and governance consulting services. Schneider Downs offers a definable, measurable and repeatable process for governing a retirement plan that meets industry best practice standards and the requirements set forth under ERISA. With offices in Pittsburgh and Columbus, SDRS encompasses two specialized practices that combine their expertise to meet the needs of our partners.

Schneider Downs Wealth Management Advisors

Established in 2000, Schneider Downs Wealth Management Advisors, LP (SDWMA) is a registered investment advisor with the U.S. Securities and Exchange Commission (SEC). SDWMA provides fee-based investment advisory and consulting services to over 85 qualified and non-qualified retirement plans.

SDAdvantage Retirement Solutions

SDAdvantage Retirement Solutions, LP (SDARS) performs retirement plan consulting, recordkeeping, and/or third-party administrative services for qualified and non-qualified retirement plans. These services typically include design and plan documentation, compliance testing, reporting, distribution services, plan corrections and consulting for retirement plans.

Ready to get started or need additional information?

Please contact Jason Lumpkin QKA, AIF® at 412-697-5472 or jlumpkin@schneiderdowns.com.
Learn more at www.sdwealthmanagement.com.