

Schneider Downs Retirement Solutions Trusted consultants. Problems solved.

When an employer decides to offer a retirement plan, they have many decisions ahead of them for which they are often unprepared. That's why plan sponsors look to Schneider Downs for more than 40 years of experience in making sure retirement plans are customized to meet their objectives, and compliant with all the rules and regulations.



Retirement plans, from start to finish.

Our team of retirement plan consultants are well-versed in the design options and administrative operations to ensure your plan remains compliant and achieves the goals you have established. Our consulting services include:

Plan Architecture

Plan Design – Creating the appropriate plan to best fit the needs of your organization and employees in order to maximize the value they receive.

Controlled Group Analysis – For companies with multiple subsidiaries, we'll confirm that your plans are in compliance with regulations and requirements unique to multi-company entities.

Regulatory

Plan Corrections – Identifying and resolving non-compliance issues, such as late remittance of contributions or not restating plan documents on schedule.

Plan Sponsor Advocacy – Assisting with IRS and DOL examinations or inquiries, including serving as power of attorney in meeting IRS requests to alleviate the stress of such examinations.

Ancillary Services

RFP Assistance – Assisting you in soliciting and evaluating submitted proposals to help you make the best decision for your organization.

Comprehensive Plan Reviews – Including fee and service benchmarking and determining how your company's plan compares to other plans with similar demographics.

Compensation Studies – Providing clients with a better understanding of what rates of pay are competitive, and what benefits programs are expected within an organization's industry.

Health & Welfare Plan Consulting – Guiding clients in the review and evaluation of benefit plan options.

Plan Governance – Providing expert advice on best practices, including oversight and adherence to your policy statement.

Broad experience to give you peace of mind.

Since 1978, Schneider Downs has helped our clients mitigate risk with practical advice, guidance and experience. Since the decisions you make about your retirement plan can have wide ranging implications for your company and your employees, we are with you to guide you every step of the way.

A full-service retirement solutions provider.



Consulting



Governance



Compliance

If you're ready to learn about all the ways we can solve your retirement plan problems, please contact Jason Lumpkin, Shareholder, at 412-697-5472, or 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.

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

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