The EJReynolds Partnership For Growth

Your partner in planning for your future and your growth

As more retirement plan options are available to advisors, recommending the right TPA to your clients demonstrates your ability to prove you are familiar with the environment and have pre-qualified successfully. We understand that the right TPA can deflect much of the risk associated with an advisor viewed as a fiduciary. This is why at EJReynolds we commit to guiding our partner advisors and their clients through all phases of retirement plan design, takeover, installation and ongoing administration. The way we see it is, if we help you to look good, we look good too.

The right TPA should have Expert Knowledge, Dedicated Service, Great Solutions and lead to growth for you and your clients.

Expertise & Experience

> Reputable qualified retirement plan expertise for over 30 years
> Diverse professional backgrounds (accounting, human resources, actuarial)
> Extensive employee accreditations (ERPA, CPC, TGPC, QPA, QKA)
> Senior administrators enrolled to practice before the IRS

Service & Dedication

> One on one quality advisor and client relationships
> Dedicated and flexible business development staff
> Bi-Lingual administrators to meet market needs
> Customized plans designed to fit sponsor goals

Service & Dedication

> Consultative approach ensures successful plans
> Leading-edge plan design through our specialization
> Fiduciary solutions and trusted management
> Advanced technology for proper administration

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The EJReynolds Partnership Ensures Dedication and Service at all Steps in the Sales, Implementation and Administration Process.

Sales

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Executive Marketing Assistant

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> Focus on added-value sales activities for advisors to grow their practice, providing marketing materials that complement their business.

> Build and maintain strong relationships with advisors by helping them to better understand plan design and administration needs.

> Run "what if" scenarios based on prospective client census.

> Request and compile proposals from appropriate vendors.

> Support Advisor at prospect and closing meetings.

> Manage expectations of prospect and advisor personnel.

Implementation

Caycee Bardol
Implementation Manager

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> Focus on coordinating all plan installation activities for start-up and takeover plans.

> Review existing Plan Document and facilitate restatement (if applicable) to ensure document compliance.

> Coordinate the transfer of participant records from prior provider (if applicable)

> Assist client with setup of payroll submission and automated services.

> Provide plan communication support, including forms, notices and administrative procedures.

> Assist clients and advisors with participant enrollment process

> Facilitate the introduction of the dedicated Plan Administrator

Administration

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Chief Executive Officer

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A Dedicated, Experienced Plan Administrator is Assigned to Each Client:

> Answer day-to-day administrative questions and issues.

> Prepare and assist client in filing of Form 5500.

> Perform all Plan related Discrimination Testing and compliance.

> Liaison between client and Investment platform.

> Process ongoing contributions.

> Process Participant Loans and Distributions.

> Calculate Minimum Required Distributions for those participants.

> Process new enrollments to the plan.

> Calculate year end employer contributions and discuss allocation scenarios with client.

> Order enrollment kits for clients.

> Identify and respond to clients' changing needs and industry trends.

> Update and support clients on new service and product enhancements.

> Calculate corrective distributions upon plan testing failures.

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WHERE IS YOUR COMFORT PLACE?
EJR CAN HELP YOU GET THERE.

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