

The background of the slide is a photograph of a business meeting. In the foreground, a person's hands are visible, holding a silver pen over a document. Another person's hands are gesturing in the air. In the background, a laptop and other documents are on a wooden desk. The image is framed by dark blue geometric shapes at the top and bottom.

QUALIFIED RETIREMENT PLAN ADMINISTRATION AND CONSULTING



Ensure your **benefits plan** is being administered accurately.



ABOUT EKON BENEFITS

For over 40 years, Ekon Benefits has provided thoughtful consulting and complete, hassle-free administration services to retirement plan sponsors. We simplify administration through timely, accurate, comprehensive services, customized to the particular needs of each client and their employees. We are retirement plan experts providing a full suite of services to both Defined Benefit and Defined Contribution Plans.

Our goal is to be your trusted retirement partner. A commitment to trust runs through our entire organization and all of the services we provide. Retirement plan success depends on expertise and flawless execution—features of our organization we are proud to showcase.

OUR SOLUTIONS



Defined Contribution Administration

401(k) Administration and Design, Participant Education, Fiduciary Consulting, Profit Sharing Compliance Services, Employee Stock Ownership Plan (ESOP), 403(b) & 457



Defined Benefit Administration

Cash Balance Consulting and Administration, Single Employer Valuation Services, Taft-Hartley, Union Plan Actuarial Services, Governmental Valuations



Plan Consulting & Design

Benefit and Fee Structure Consulting, Funding and Accounting Strategies, Support and Analysis for Business Changes and Mergers



Compliance & Administration

Day-to-day Plan Management, Discrimination Testing, Audit Assistance, IRS and DOL Compliance Services



Fiduciary Benchmarking

Plan Operation Reviews, Plan Document Compliance Assessments, Plan Investment Analysis and Benchmarking, Participant Communications and Participation Review



WHY CHOOSE EKON BENEFITS?

The design and administration of each retirement plan should be customized to the particular needs of each organization. We strive to give each client a solution that meets the individual needs of their participants. We have a proven track record as one of the most accurate and timely retirement plan services providers in the industry. Each of our partners is assigned a Dedicated Plan Specialist who is familiar with the specific plan provisions of each plan and is knowledgeable on the legal and regulatory environment.

At Ekon Benefits, we care about the success of our partner organizations and work tirelessly to craft retirement plans that align with your goals. Retirement plan administration should be left in the hands of a trusted partner, and that's exactly what Ekon aims to be.

CASE STUDY

A facility solutions provider was suffering from retirement plan administration burdens due to communication issues from a large, national retirement plan provider. Ekon's consulting afforded a simplified administrative structure, ensuring compliance and improving communication.



Minimize administration headaches and ensure compliance with our **retirement plan expertise.**





CERTIFICATIONS AND ASSOCIATIONS



American Retirement Association
Society of Actuaries
American Academy of Actuaries
SOC-1 Certified

CONTACT US!

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