

# Is Your Retirement Plan?

# OPEN.

When you think of your company's retirement plan, what comes to mind? Administration...testing...fees...reports...deadlines...penalties...the IRS?

Trinity Pension Consultants is dedicated to removing the stress associated with maintaining the administration and compliance of your company's retirement plan with an OPEN solution that is simple, flexible and proactive.

- OPEN communication
- OPEN design
- OPEN discovery
- OPEN revenue offsets

**Different than the typical third-party administrator,** Trinity

puts the relationship before the transaction. Getting to know you and your goals, understanding your business, listening to your pains and your challenges. Only after we become partners with you in your business can we truly design a plan that begins with your company needs first. We call this OPEN. Is your retirement plan OPEN?



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## Communication

Retirement administration can often be a dry routine of collecting data and filing reports, but your business is fluid, organic, and changes from time to time. So Trinity takes the proactive approach and asks the timely question – “How is your retirement plan working for your company today?” The **OPEN** communication by Trinity makes dialogue with you our top priority because our experience has shown most plan related problems can be traced to a breakdown in communication.

## Design

Simplicity is the key to the success to your retirement design. So Trinity asks every company this simple question – “How much do the owners want to contribute to the plan?” The **OPEN** design by Trinity takes a top-down approach and works backwards from the owner’s number to provide the right set up for the entire company.

## Discovery

Often plan sponsors are caught up on what cannot be done, or they have misconceptions about what the rules actually say. So Trinity asks our clients this illuminating question – “How would the perfect retirement plan work for your company?” The **OPEN** discovery by Trinity reveals to plan sponsors that their wish list for their company’s retirement plan is usually not far from reality.



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## Revenue Offset

You may or may not know that Investment Providers typically offer revenue to Third Party Administrators like Trinity Pension Consultants. We believe this revenue should be given back to YOU as it was intended. So, each year you will receive an annual credit, up to 100% of your base administration fee. Simply put, Trinity uses these revenue amounts to offset (or subsidize) your administration on a dollar for dollar basis. It’s that easy.

**Whether you are considering the options** for your company’s first retirement plan or you’re evaluating your current situation and are not happy with what you see, Trinity can open you to the possibilities available with an **OPEN** retirement plan.

**OPEN** communication. **OPEN** design. **OPEN** from Trinity Pension Consultants.

How  **OPEN** is your retirement plan?

Find out more by calling 330-869-3747 or visit [www.TrinityPension.com](http://www.TrinityPension.com)