



TRINITY

PENSION CONSULTANTS

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THE IMPORTANCE OF PLAN COMPLIANCE

All qualified retirement plans must follow the rules and regulations set forth by the IRS and Department of Labor to enjoy the tax benefits of deferrals and deductions.

NON- COMPLIANCE CONSEQUENCES

- Corrective Distributions
- Required Contributions
- Fines and excise taxes
- Time and money on IRS correction programs
- Disqualification of the plan

TRINITY CAN HELP

- Provides comprehensive and accurate administration
- Maintains an up-to-date plan document with required amendments
- Educates and informs you of changing regulations
- Provides alerts to common compliance failures
- Communicates with IRS

WHAT YOU CAN DO

- Provide complete and accurate census data
- Communicate any changes to corporate structure
- Operate the plan exactly as it is written in the plan document
- Regularly meet with your Relationship Manager at Trinity



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