TRINITY
PENSION GROUP, LLC

Summary of Services

making retirement plans successful

Plan Design-Feasibility Analysis
This is typically the initial phase for clients. Trinity's role is to demonstrate the advantages and disadvantages of each plan and then select a specific plan design for the client.

Implementation
Implementation involves preparation and delivery of the necessary documents to begin the program.

Employee Communications
When requested, Trinity's consultants are prepared to communicate the plan design features to the client's employees.

Annual Administration
Annual administration will typically include all services required throughout the plan year, as well as all required year-end reports.

Compliance Consulting
When laws change, Trinity's consultants will assist the plan sponsor to ensure their plan design is still appropriate.

Plan Termination
Trinity will consider the uniqueness in design coupled with the circumstances to determine the appropriate process for terminating the plan.

Trinity Pension Group, LLC (Trinity) provides third party administration for employer-sponsored retirement plans. Since 1994, our firm has been providing services, which include plan design, document services, consultation, employee communications and annual administration.

Trinity Pension Group, LLC

4194 Mendenhall Oaks Parkway, Suite 180
High Point, NC 27265

336.889.4100 Phone
336.889.4114 Fax

www.trinity401k.com