

Plan Administration

Services To Design and Operate Your Plan



Plan Administration

The administration of qualified retirement plans requires thorough knowledge of a complex and evolving regulatory environment. From plan design to implementation to ongoing support, JULY's expert teams are with you every step of the way focusing on the unique needs of your plan.

Plan Design – Tailored for You

We understand that great employees are the foundation of every great company. That's why JULY designs retirement plans to meet your needs. Whether your objective is recruitment, retention, or augmenting benefits for key employees, JULY's retirement plan specialists construct plans to achieve your goals. Plan options include:

- Traditional 401k Plans
- Safe Harbor 401k Plans
- New Comparability Plans
- Solo 401k Plans
- Cash Balance Plans
- Defined Benefit Plans

Plan Implementation – Making the Complex Simple

Whether you are setting up your retirement plan or converting your plan from a legacy provider, JULY has a dedicated setup team to guide every step of the process, including:

- **Plan Documents** - prepared by experienced ERISA plan design consultants who will help you avoid costly mistakes.
- **Plan Setup or Conversion** - managed by our dedicated setup team that provides hands-on care through each step of plan setup or conversion.

Plan Operation Support - Optimizing Value from Your Plan

JULY ensures effective administration of your plan management through:

- **Compliance Management** - our comprehensive compliance testing services ensure the integrity of your plan.
- **Tax Compliance** - signature-ready tax returns fulfill all plan-related tax filing requirements.
- **Operational Support** – your dedicated Client Service Manager will provide you with ongoing support throughout the year.

Participant Support – Providing the Right Tools

JULY has solid alliances with financial providers who ensure your participants have the necessary tools to plan for and achieve a secure financial future.

- **Onsite Enrollment** - many of our recordkeeping and mutual fund partners conduct on-site enrollment meetings for your plan participants.
- **Enrollment Materials** - professional enrollment materials help guide participants' enrollment and investment decisions.
- **Investment Advice** - access to online investment advice and guidance helps secure a participant's financial future and, as a plan sponsor, that can reduce your fiduciary liability.

Learn more about Administration Services at www.julyservices.com