

Integrated Solutions for Payroll, Retirement
and 3(16) Plan Administrator Services

Count On Us For All Of It



Your Life, Easier

Experience a new level of easy with integration for payroll, retirement, and 3(16) plan administrator services.

First Step: Easier Payroll and Retirement Integration

Payroll and retirement are closely linked, with payroll data feeding several retirement plan processes.

When the two are integrated with FuturePlan, there's less administrative work for you, less room for error, and less liability. As an integrated client, you no longer submit a year-end census, or submit contributions to investment providers or brokerage accounts. Data is sent where it belongs, without the need for you to be involved.

Have you ever experienced or worried about one of these plan issues?

- Loan repayment errors
- Late deposits
- Compensation definition not followed
- Missed employee deferral opportunities
- Incorrect sources on payroll files
- Per payroll match contribution calculation errors
- Plan contribution limit failures
- Census submission issues
- Hardship distribution errors

These errors, and others, are solved when you utilize FuturePlan experts for payroll and retirement services.



Everything You Need, In One Place



Next Step: Easier Plan Maintenance and Compliance

When you utilize FuturePlan Fiduciary Services for 3(16) plan administration, you are no longer the sole fiduciary for your plan. With our proprietary software that checks data integrity every payroll run, and a dedicated, hands-on relationship manager monitoring the details, we're confident your plan is safest in our hands. We review closely for any type of data integrity issues, find any errors, and correct them before they become costly mistakes.

Your Life, Much Much Easier

When you integrate payroll, retirement, and 3(16) plan administrator services, you hand over your retirement plan to us and let us take it from there.

Here's the experience:

Plan sponsors process payroll, and all other retirement plan responsibilities are completed by FuturePlan.

We do what we do best, so you have time to do what you do best.

As an integrated client, your payroll data is checked, and your plan is administered correctly, all of the time.

Integrate your retirement administration and 3(16) services with FuturePlan and see your to-do list shrink significantly.

Retirement Responsibilities without FuturePlan

Investment choices
Corporate decisions
Plan design
Calculation of contributions & forfeitures
Participant notices
Compliance testing
Preparation of annual reports
Form 5500
Audit support
IRS Forms 1099-R or 945, as needed
Hardships
Terminations
Loans
Qualified domestic relations orders (QDROs)
Eligibility
Summary plan descriptions
Required minimum distributions
Vesting
Rollovers
Distributions
Enrollment materials
Annual employee notices
Payroll processing
Tax depositing and filing
Quarterly filing
Annual filing
Retirement reporting and compliance review

Retirement Responsibilities with FuturePlan

Investment choices
Corporate decisions
✓ Plan design
✓ Calculation of contributions & forfeitures
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✓ Compliance testing
✓ Preparation of annual reports
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✓ Terminations
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✓ Qualified domestic relations orders (QDROs)
✓ Eligibility
✓ Summary plan descriptions
✓ Required minimum distributions
✓ Vesting
✓ Rollovers
✓ Distributions
✓ Enrollment materials
✓ Annual employee notices
✓ Payroll processing
✓ Tax depositing and filing
✓ Quarterly filing
✓ Annual filing
✓ Retirement reporting and compliance review

Safeguard your plan and hand the tasks, responsibilities, and liability over to us.

We'll take it from here.