



# Tailored Solutions for Retirement Plan Administration



### Retirement Plan Design & Document Services

- Custom retirement plan design
- Preparation of IRS pre-approved plan documents
- Safe harbor notices; QDIA notices
- Summary plan description

### Annual Compliance, Administration & Tax Services

- Calculation of employer contributions and deduction limits
- Eligibility determinations and vesting calculations
- Form 5550 tax filings and other applicable tax returns
- IRS compliance testing and limitations
- Preparation of interim and annual plan administration reports
- Preparation of participant benefit statements
- Trust accounting, financial reporting, and deposit reconciliations

### Loan & Distribution Transactions

- Assistance with QDROs, 72 RMDs, and death benefit payouts
- Hardship reviews and consulting
- Loan administration
- Participant distribution processing
- Preparation of 1099-R and Form 945 as requested

### Plan Types Served

- 401(k) plans (traditional & Safe Harbor)
- 457 deferred-compensation plans
- Cash balance pension plans
- New comparability/cross-tested plans
- Profit sharing plans

### Technical Reviews & Consulting

- Best practices and operational reviews
- Consulting for IRS and DOL correction programs and application package
- Related employer issues (controlled group/affiliated service groups)
- Retirement plan considerations during merger and acquisition transactions

As a business owner, you have endless responsibilities and tasks without infinite time to accomplish them. CRI TPA Services understands that retirement plans are not your primary focus and can often be incredibly time consuming. Our services are designed with two goals in mind: customizing a retirement plan to fit your organization's needs and objectives, and reducing unnecessary administrative burdens on your business.

At CRI TPA Services, we strive to understand you and your business and design a retirement plan that best fits your long-term goals—whether those goals are to gain significant tax advantages, to attract and retain key employees, addressing unique personnel circumstances, or improving employee participation rates.

We understand the importance of being compliant with the complex laws and regulations mandated by the Internal Revenue Service and Department of Labor. Our team of experienced and certified pension professionals can help you and your staff operate and maintain your plan in an efficient and cost-effective manner. We have solutions to reduce administrative tasks, including uploading payroll deposits, mailing required participant notices, as well as approving loans and distribution requests.

We also partner with the rest of our CRI Family of Companies to offer comprehensive solutions that meet your business' goals and the personal needs of your employees to build retirement funds for their future. Together, we can advise you on payroll management and retirement plan design, investment selections, and employee education programs.

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