

ADMIN PARTNERS, LLC.

The Knowledge You Need. The Compliance You Require. The Service You Deserve.

ADMIN Partners understands that retirement plan administration is not always a one-size-fits-all service. With this in mind, we offer several service options that give our clients the ability to choose the level of plan support that meets their needs and their budget.

PLATINUM MODEL

Full service option, the Platinum Model provides Plan Sponsors with a comprehensive suite of services, including plan document support, compliance approval and monitoring, and contribution administration (common remittance) support. The Platinum Plan is ideal for employers that want someone to manage the day-to-day requirements needed to maintain a compliant retirement plan. This model is also recommended for employers with complex plan features or those with multiple approved vendors.

GOLD MODEL

Our Gold Service Model offers the same comprehensive suite of plan administration and record keeping, but does not include the contribution administration (common remittance) services that are included in our Platinum Model. The Gold Model is ideal for small to mid-sized Plan Sponsors with a basic retirement plan design and a manageable number of approved vendors.

SILVER MODEL

Designed for clients who wish to maintain a level of self-administration, but still want the support of a TPA for document and compliance purposes, the Silver Service Model provides numerous self-help tools to assist and guide clients. The Silver Model is most suitable for organizations with a small number of plan participants. Plan Sponsors are also given access to ADMIN Partners' professional help-desk to answer any questions they may have.

PLAN SERVICE HIGHLIGHTS	PLATINUM	GOLD	SILVER
Plan Design and Consultation	✓	✓	✓
Plan Document Preparation	✓	✓	✓
Plan Start-up Activities	✓	✓	
Vendor Relations and Compliance	✓	✓	
Administrative Service Materials	✓	✓	
Employer Communication Materials	✓	✓	✓
Audit Support	✓	✓	
Secure Web Portal	✓		
Contribution Administration	✓		
Monitor Contribution Limits	✓	✓	
Excess or Misapplied Contribution Corrections	✓		
Compliance Monitoring and Record Keeping	✓	✓	
Compliance Alerts and Help Desk Support	✓	✓	✓
ERISA Services (if applicable)	✓	✓	

To learn more about our service models and to see what level of service works best for your retirement plan, contact our Sales Team at 877-484-4400, option 2.

