WARREN AVERETT
BENEFIT CONSULTANTS, LLC

# OFFERING BENEFIT PLAN SOLUTIONS TO CLIENTS OF ALL SIZES AND PLAN TYPES

**Warren Averett Benefit Consultants has been providing retirement plan administration services since 1979. With a team of professionals devoted exclusively to plan administration and consultation, we serve retirement and employee benefit plans ranging from 1 to 3,000 participants.**

ERPA

Enrolled Retirement Plan Agent—one of the designations our professionals offer

Through our designated division of Benefit Consultants, the Firm assists a variety of organizations with comprehensive administrative retirement plan services including:

- Plan design, consultation and administration
- Plan compliance

## Customized Plan Design and Administration

We evaluate a variety of qualified retirement plans and will recommend a plan design that delivers maximum benefit to the owners and employees. We will recommend plan amendments or termination when warranted, and we will summarize all annual, semi-annual or quarterly accounting transactions in the retirement plan. This includes allocation of contributions, forfeitures and plan earnings. We assist with determination of employee eligibility and vested benefits for each employee.

## Annual Plan Compliance

Through non-discrimination testing and complete and timely filing of required tax documents including Form 5500, compliance matters are handled and results processed to the appropriate third parties.

## Broad Investment Availability

A wide range of investment options are available through our trading partners. Working with your investment advisor, we will determine which partner is best suited to meet the needs of your plan.

## Types of Plans We Serve:

- 401(k) Plans (traditional or safe harbor)
- 403(b) & 457(b) Plans
- Cash Balance & Defined Benefit Plans
- Profit Sharing Plans (including cross testing formula or aged based formula)
- Health & Welfare Benefit Plans
- Money Purchase Pension Plans

To learn more about our benefit plan services, visit our website at www.wabenefitconsultants.com.

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