

# ERISA Fiduciary Services 402 (a) “Named Fiduciary” Trustee Service

By sponsoring a retirement plan, your company is liable for the plan’s operations. That liability filters down personally to all owners and employees who control the plan. These individuals become personally liable for the plan’s investments. This is true even if these individuals aren’t aware or didn’t agree to such liability.

ERISA Fiduciary Services Trustee Services eliminates your personal liability on your plan by acting as Trustee and “Named Fiduciary” for your plan

## KEY FEATURES OF OUR SERVICE

- We eliminate liability for you and your officers and employees
- Your personal liability is shifted to experts specifically dedicated to the plan on a fiduciary basis
- You get the expertise and knowledge of experienced retirement plan professionals
- Responsible for reporting and day-to-day operations and compliance
- The cost is minimal and can be paid by the plan

## LIST OF SERVICES

- Plan Operational Oversight and Compliance
- Plan Document Administration
- Service Provider Selection and Oversight
- Participant Notices and Disclosures
- 5500 Filing
- Enrollment Package Mailing
- Involuntary Force-outs