

# RETIREMENT SERVICE

# PROVIDER

	<b>EIP</b>	Advisor	Recordkeeper	TPA	Product Sponsor	ERISA Attorney	Broker/Dealer	Custodian/Trustee
<b>PLAN DESIGN</b>								
Customized Plan Support	✓					✓		
Plan Document Preparation	✓					✓		
<b>PLAN ADMINISTRATION</b>								
Form 5500 Preparation	✓			✓				
Discrimination Testing (ADP/ACP)	✓			✓				
Participant Communication	✓							
Onsite Enrollment Meetings	✓	✓						
Payroll Submission Support	✓							
Distributions	✓		✓					
Loan & Hardship Processing	✓		✓					
Recordkeeping	✓		✓		✓			
<b>INVESTMENT SUPPORT</b>								
Selection & Review	✓	✓						
Ongoing Monitoring	✓	✓						
Performance Reporting	✓	✓			✓			
Prospectus Support	✓				✓		✓	
<b>FIDUCIARY SUPPORT</b>								
Investment Policy Statement	✓	✓						
Quarterly Trustee Report	✓	✓						
404(c) Compliance	✓							
<b>PARTICIPANT SERVICE</b>								
Managed Accounts	✓	✓						
Employee Web Access	✓		✓					
Financial Planning Tools	✓	✓						
<b>REPORTING</b>								
Auditor Package	✓			✓				
Executive Summary	✓		✓					
Trustee Services	✓							✓
Form 1099-R	✓		✓	✓				
Summary Annual Report (SAR)	✓			✓				
Summary Plan Description (SPD)	✓			✓				
Certified Trust Statements	✓							✓

# What do retirement plan service providers *really* do?

## It depends. Who is your service provider?

EIP offers a unique bundled service that allows us to handle all your retirement & 401(k) plan needs from one place. We provide superior service at a better price and have the expertise you need to facilitate the entire retirement plan process.

A black and white photograph of the Austin skyline, featuring several prominent skyscrapers, reflected in the calm water of a lake or river. The foreground shows a bridge railing and a walkway.

## **Homegrown in Austin**

Since 1974, EIP has served as Austin's premier benefits consulting firm. We take pride in serving our community and value the relationships we have built with local businesses. As Austin continues to innovate and grow, we look forward to helping more employers provide valuable benefits to attract and retain top talent.