RMS

RETIREMENT MANAGEMENT SERVICES, LLC

Comprehensive Retirement Services for Your Business

Our services are designed to make your job as easy as possible. We can design a retirement plan that not only initially meets the organization and employee needs, but continues to meet those needs as the business grows and evolves.

Retirement Plans, from 401(k) to ESOP, designed to fit *your* company, *your* employees.

DESIGN AND DOCUMENTS

A custom-tailored, volume submitter document is uniquely drafted for each plan.

ROUTINE SERVICES

High quality services are viewed as fundamental to our engagement with clients.

CONSULTING AND SPECIAL SERVICES

Your retirement plan is as unique as your company. Our customized services include:

- Controlled group analysis
- IRS and DOL corrections
- Plan design studies, including new comparability analysis
- Mergers and Acquisitions
- Vendor searches

PREVAILING WAGE

Special consideration needs to be given to plans that incorporate prevailing wage laws. Our team of prevailing wage experts can work with employers who wish to contribute their prevailing wage fringe inside the retirement plan.

ESOPS

Employee Stock Ownership Plans are a great way for a business owner to sell the company while also rewarding hard-working and dedicated employees. Our extensive experience with the administration of ESOPs can help you every step of the way - from an ESOP feasibility study, for business owners who are trying to determine if they should establish an ESOP, to ongoing administration and repurchase obligation studies.

CASH BALANCE PLANS

A cash balance plan is a type of pension plan that is often described as a "hybrid" plan because it combines the design flexibility of a defined contribution plan with the investment security of a defined benefit plan. Employers will often establish a cash balance plan as a way to create a tax-favored vehicle for large contributions for certain key employees.

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RETIREMENT MANAGEMENT SERVICES, LLC

Designing and administering creative, tax efficient retirement plan solutions.

The Quality Partner for Your Retirement Plan

Dedicated Client Service Team… familiar with your retirement plan. One go-to resource for all your administrative questions.

Highly Credentialed Professionals… available to help you manage your fiduciary responsibilities and keep your plan in compliance. Our team of ERISA experts includes CPAs, Accredited Pension Administrators, Qualified 401(k) Administrators and ESOP administration professionals.

Total Fee Transparency… with our fees fully disclosed and all revenue sharing rebated back to the Plan Sponsor.

Annual Report and Management Letter… provides timely review of your plan's status and suggestions for future enhancements.

Technical articles, newsletters and seminars on current retirement plan topics… gives you access to expert knowledge from our retirement industry leaders.

Independence from other plan advisors… means we can partner with your preferred investment advisor and recordkeeping platform.

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Consulting Services for
Corporate Retirement Programs

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