



QUALIFIED PLAN CONSULTANTS

EMPLOYEE BENEFITS CONSULTANTS



Company Information

Qualified Plan Consultants is a cutting edge employee benefit consulting firm that provides record-keeping, administration, actuarial and fiduciary services for qualified retirement plans. QPC specializes in the design, installation and administration of all types of qualified retirement plans. QPC fully understands all aspects of the retirement plan model from Recordkeeping & administration, investment representative and accounting. The retirement plan experience is made much easier with an expert who can communicate with all parties involved.

QPC can be involved as much or as little in the servicing of the retirement plan as the situation dictates. QPC will normally act as the Third Party Administrator and Recordkeeper. QPC can act in an administration only or Recordkeeping only capacity if needed. However, nowadays with the threat of litigation as high as it has ever been, some investment professionals prefer to have a TPA who will act as an investment fiduciary to the plan as well. Ensuring that the fiduciary liability of the Plan Sponsor be kept as low as possible.

QPC does however believe that a financial advisor, investment consultant or other financial intermediary is a vital part of a plan remaining in compliance and operating smoothly. QPC works through financial intermediaries only.

Types of Retirement Plans Serviced By QPC

- 401(k)
- 401(a)
- 403(b)
- 457
- Roth
- Defined Benefit
- Cash Balance
- Profit Sharing
- Money Purchase
- Pension

Plan Administration

- Signature-ready IRS Form 5500 preparation
- Annual nondiscrimination and compliance testing
- Annual match, profit sharing or defined benefit calculation
- Plan design consultation
- Prototype or Volume Submitter document
- Summary Plan Description
- Summary Annual Report

Daily Recordkeeping

- Daily account valuation recordkeeping
- User friendly website access for participants
- Easy to understand quarterly participant statements
- Automated payroll processing
- Asset allocation modeling capability

Fiduciary Services

- Create an investment policy statement
- Plan management agreement detailing roles and responsibilities
- Select and monitor investment options
- Qualified default investment alternatives
- 404(c) compliance to reduce the liability associated with participant decisions
- Risk Based Target Date Model Portfolios

Full Fee Disclosure

- Fees are fully disclosed ahead of time
- Any revenue generated from funds is credited back against disclosed fees
- Fees are simply computed and billed quarterly

Open Architecture

- Over 10,000 mutual funds available
- Index funds are available
- Exchange Traded Funds are available on a T-1 settlement
- Risk Based or Target Date Model portfolios of the provider of your choice
- Not Enough? Self Directed Brokerage Accounts are available



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