

THE PENTEGRA KSOP ADVANTAGE

Retirement Plans should be as individual as you are. Pentegra's KSOP Advantage is a flexible, full service KSOP solution that can be custom designed to meet every client's unique needs.

The Pentegra KSOP Advantage delivers all of the services you need from a single provider, including plan design and document support, plan consulting, administration and recordkeeping, company stock services, legal and technical support, trustee and custodial services, regulatory compliance and government reporting, investment management and sponsor and participant communications.

Our comprehensive services include a dedicated relationship management team—backed by in house ERISA attorneys, certified investment professional consultants, compliance experts and communication and education specialists who are knowledgeable, experienced and trained to handle the complex issues surrounding company stock and retirement plans.

Pentegra administers company stock in a daily valuation environment—whether it is traded thinly or traded on a major exchange—and offers 24/7 access to account information and fund performance. We provide a full spectrum of employer stock services—from the IPO to disseminating employee communication and proxy requirements.

Pentegra's flexible investment approach offers you a choice of an open architecture platform or our Investment Select Menu. Our Investment Select Menu offers style specific alternatives across the investment spectrum. We evaluate, select and monitor our Select Menu—giving you the benefit of full 3(38) fiduciary protection for these investments and relief of responsibility for the investment management process. Alternatively, our open architecture platform selection delivers one of the widest selections of mutual funds in the industry with access to more than 5,000 mutual funds with over 400 fund families and more than 11,000 share class alternatives



KSOP ADVANTAGE SERVICES

- Plan Design & Document Support
- Plan Consulting
- Administration & Recordkeeping
- Regulatory Compliance & Government Reporting
- Legal & Technical Support
- 3(38) Fiduciary Protection
- Plan Audit Services
- Investment Management
- Plan Stock Services
- Trust & Custody Services
- Annual Plan Review & Reporting Package
- Comprehensive Education & Communication Materials
- Pentegra OnLine 24/7 Access
- Retirement Modeling and Advice Tools

Our consultative approach results in a retirement solution that helps everyone achieve their retirement goals. For more information, contact us at 800-872-3473, or www.pentegra.com.



PENTEGRA
RETIREMENT SERVICES

Our difference is your advantage.
www.pentegra.com