

THE PENTEGRA ESOP ADVANTAGE

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

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



Our comprehensive services include a dedicated relationship management team—backed by in-house ERISA attorneys, certified investment professionals, actuaries, 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.

ESOP ADVANTAGE SERVICES

- Plan Design & Document Support
- Plan Consulting
- Administration & Recordkeeping
- Regulatory Compliance & Government Reporting
- Legal & Technical Support
- Plan Audit Services
- Plan Stock Services
- Trust & Custody Services
- Annual Plan Review & Reporting Package
- Comprehensive Education & Communication Materials
- Pentegra OnLine 24/7 Access

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.