

OUR DIFFERENCE IS YOUR ADVANTAGE

THE PENTEGRA 401(a) & 403(b) PLAN ADVANTAGE

CUSTOM RETIREMENT PLAN SOLUTIONS FOR NON-PROFIT AND GOVERNMENTAL ORGANIZATIONS

Retirement plans should be as individual as you are.

Pentegra offers a comprehensive array of flexible, full service 401(a) and 403(b) plan solutions for non-profit and governmental organizations that can be custom designed to meet every client's unique needs.

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

Our comprehensive approach includes 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 non-profit and governmental retirement plans.

Pentegra's flexible investment approach offers you a choice of an open architecture platform or our Investment Select Menu. Our Investment Select Menu provides style-specific alternatives across the investment spectrum. We evaluate, identify, select and monitor this Select Menu—giving you the benefit of full 3(38) fiduciary protection as Pentegra relieves you of the responsibility for the investment management process. Alternatively, our open architecture platform option 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.



PENTEGRA 401(a) and 403(b) and 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
- Trust & Custody Services
- Annual Plan Review & Reporting Package
- Comprehensive Education & Communication Materials
- Pentegra OnLine 24/7 Access
- Retirement Modeling & 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 at www.pentegra.com.