

# A 3(16) Fiduciary Services Proposal for ABC Company.

## Enhanced 3(16) Fiduciary Benefits

- Sign and file Form 5500
- Review Compliance Tests
- Review Contribution Calculations
- Review Census Data for reasonableness
- Plan audit support – up to two hours
- Interpret Plan Provisions as an independent fiduciary
- Review and approve Qualified Domestic Relations Orders (QDROs)

Please refer to the terms of the service agreement for full details.

## Enhanced 3(16) Program Features

- Fiduciary Warranty – Pentegra's promise to you
- Fiduciary Document Vault – Online document storage
- Fiduciary Scorecard – Annual fiduciary duties checklist

Pricing: \$2,000 per year plus \$5 per participant

