

# 3(16) FIDUCIARY SERVICES



AVINTUS IS PREPARED TO HELP WITH YOUR  
FIDUCIARY SERVICE NEEDS.

## Overview

The Avintus 3(16) Fiduciary Services program is the premier solution for plan sponsors who are looking to hire a professional Plan Administrator. Using this solution, our firm will assume the role of Plan Administrator to reduce the liabilities for a plan sponsor and streamline the plan's operations.

## Plan Administration Includes:

- Avintus named in Plan Document as Plan Administrator
- Plan Document Maintenance
- Monitor for Newly Eligible Participants
- Sign-off on Participant Distribution Forms
- Loan Administration
- Forfeiture Account Monitoring
- Form 5500 Preparation and Authorization
- Distribution of all required participant notices: SPD, Safe Harbor, QDIA, SAR, and 404a-5
- Monitor timing of plan contributions
- Comprehensive Annual Compliance Testing

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Franklin, TN 37067  
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## Payroll

In order for a 401(k) plan to be administered correctly, payroll and census data must be flowing timely to your plan's investment record keeper. Avintus can help with this process using Avintus Employer Services, which is the industry's premier 401(k) payroll integration solution.

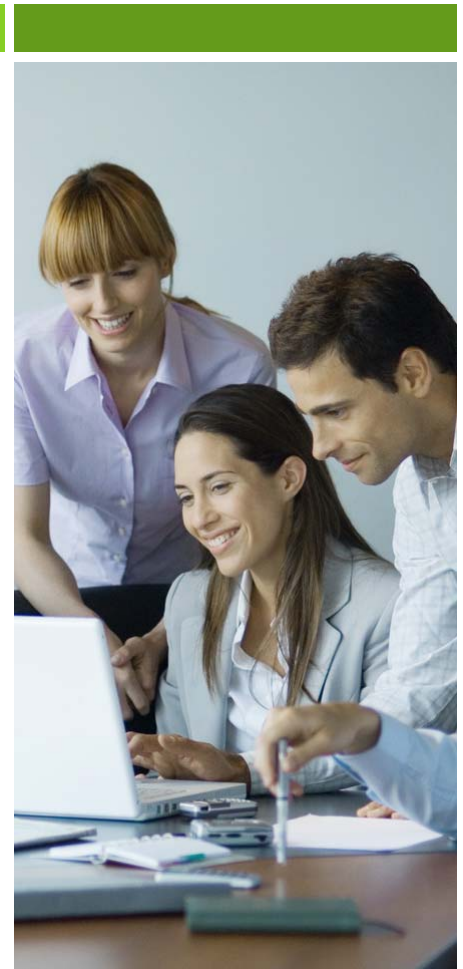
Avintus Employer Services provides web based payroll solutions for your company and assumes the following 401(k) responsibilities:

- Submitting comprehensive payroll data to your plan's record keeper each pay date.
- Processing 401(k) deposits each pay date within the Department of Labor requirements.
- Providing year-end census data for completing the year-end plan administration functions.

## Record Keepers

Companies who choose to use a separate payroll solution must submit comprehensive payroll data to the investment record keeper each pay date. File formatting requirements can be provided to assist your payroll administrator.

Record keepers approved for 3(16) Fiduciary Services through Avintus include: Transamerica, Empower, John Hancock and MassMutual.



## CONTACT US TO GET STARTED

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