



uniglobal. defining retirement.

OUR SERVICES

- Create a new or redesign your existing retirement plan.
- Assist with implementation and preparation of plan amendments as requested.
- Maintain plan compliance with ever-changing pension laws.
- Determine eligibility and vesting for all members.
- Calculate retirement or termination benefits.
- Perform annual coverage, contribution, and discrimination tests ensuring IRC compliance.
- Generate annual employer contribution allocation reports.
- Perform annual reconciliation (valuation) of plan deposits and withdrawals.
- Prepare all required DOL and IRS filings for the plan.

RETIREMENT SOLUTIONS THAT WORK FOR YOU AND YOUR COMPANY

Uniglobal Pension Planning, Inc. is a full service Third Party Administrator (TPA) offering the highest level of retirement plan consulting and compliance services for employers. Our services are available for 401(k), 403(b), 457, Profit Sharing, Money Purchase, Section 125 Cafeteria Plans, and non-qualified plans. We are a team of experienced professionals who are committed to total customer satisfaction.

Headquartered in Metropolitan Washington, DC with offices in West Virginia, Florida, and New York, Uniglobal Pension Planning, Inc. has been providing clients with customized and efficient plan administration and support since 1990. We administer in excess of 400 defined contribution plans with over 25,000 participants and assets of over \$500 Million. While we are primarily a regional firm, our client base spans from coast to coast.

The strength of our expertise plus our focus on communication and client interaction ensures that your retirement program performs flawlessly. Our team of professionals is first committed to customizing a menu of retirement plan options that will best meet the needs of each client. At Uniglobal we understand that running a retirement plan is not something that can be done in isolation. That is why an experienced benefits analyst will be assigned to you to aid in the administration of your retirement plan.

