

ERP Retirement Services' corporate mission is to help businesses save money and accumulate retirement wealth with a qualified retirement plan solution. Known and respected as an industry leader, ERP effectively delivers superior, customized retirement plan designs, compliant plan administration and experienced actuarial and retirement plan services that reduce plan costs and increase savings. Our team of credentialed pension professionals is committed to providing timely information and proactive solutions to help business owners save money through their 401(k) and other qualified retirement plans.

Today, it is necessary for small businesses to provide a 401(k) plan for their employees in order to compete for and retain the best workforce. ERP will design the best, customized employee benefits program to attract, motivate and retain excellent talent. We will also assess your existing plan to find ways to save you money.



ERP provides businesses with the added advantage of cost savings while offering the best 401(k) and retirement plan solution that achieves all current and future retirement goals.

ERP Retirement Services is one of the leading pension specialist/actuarial firms in the New York/Metropolitan area and has clients in over 20 states. The cornerstone of our success is our philosophy of providing the highest level of service, generally

reserved for Fortune 500 companies, to small and midsize businesses at affordable prices. Plus, backed by our industry-respected reputation, our clients always have peace of mind knowing that their plan is operating according to IRS regulations while continuing to meet all retirement objectives.

ERP Retirement Services provides the following plan services:

- › Plan Design and Implementation
- › Plan Document Services
- › Development of Procedures and Forms
- › Plan Design Consultation
- › IRS Form 5500 Preparation
- › Annual & Mid-Year Compliance Testing
- › Loan Processing
- › Employee Terminations
- › FASB Valuations
- › Actuarial Certification of DB Plans
- › 401(k) Administration
- › 401(k) Safe Harbor
- › Profit Sharing Plans
- › New Comparability Plans
- › 401(k)/Cash Balance Combo Plans