

Actuarial Menu

Actuarial Services to Fit Your Needs

At Pinnacle Plan Design we listen to your unique needs, then tailor a custom package of actuarial services for you. You maintain control of your client relationship and partner with us for the actuarial services you need.

Defined Benefit Plan Essentials

- Preparation of Schedule SB
- Actuarial Certification
- Computations of Annual Cost (minimum required, maximum deductible, recommended)
- Participants Statements
- Preparation of PBGC Comprehensive Premium Filing (if applicable)
- Preparation of PBGC Annual Funding Notice (if applicable)
- Computations Regarding Passage of Non-Discrimination Testing (if applicable)
- Co-branding With Pinnacle Plan Design and Your Firm (if desired)

Full Administration – Includes Defined Benefit Plan Essentials Plus:

- Preparation of Form 5500 Series
- Preparation of Summary Annual Report
- Preparation of Form 8955-SSA
- Preparation of Distribution Paperwork (as needed)
- Trust Accounting

Design and Document Services

- Design of Defined Benefit Plan
- Preparation of Defined Benefit Plan Document

Other Services

- Estimates for Planning/Forecasting
- Communication with Client
- Cash Balance Education for your TPA Professionals
- Marketing Materials
- Human Resources (HR) Consulting

Pinnacle Plan Design, LLC

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