

Actuarial Consulting Services For Third-Party Administrators



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Scott Basco
FSA, EA, MSEA

Joe Nichols
EA, FSEA, ASA

Grant Dozer
EA, MSEA

We Design and Sign. You Shine.



Cash Balance & Traditional
Defined Benefit Thought Leaders



Part of Your Team



Quick Turnaround



Expand Your Offerings;
Grow Your Firm



Included in Actuarial Consulting Package

Design of Traditional Defined Benefit or Cash Balance Plan
Preparation of Plan Document
Signed Schedule SB
Signed Actuarial Certification of the AFTAP
Preparation of Actuarial Valuation Report and Participant Statements
Computations of Permissible Funding Range
Combined-plan Non-discrimination Testing*
PBGC Comprehensive Premium Filing*
PBGC Annual Funding Notice*

*if applicable



Complimentary plan design
illustrations



Assistance with marketing
efforts



No minimums or subscriptions



Simply pay us a discounted
fee once we have gone to work
for you and your client

You maintain control of your client relationship.

You prepare Form 5500 and perform the trust accounting.

CASH BALANCE PLANS • TRADITIONAL DEFINED BENEFIT PLANS

Testimonials From Our TPA Partners

We have had the privilege of working with the staff at Pinnacle Plan Design since 2007. By collaborating with Pinnacle Plan Design and Kevin Donovan, we can offer our clients a full assortment of plan design alternatives to include defined benefit and cash balance plans without having an enrolled actuary on staff.

Kevin is an expert at explaining complicated plan design alternatives on levels that our staff, our clients and our financial advisors understand. He has taken the time to answer our clients' questions during conference calls and he recently spoke at a financial advisor symposium where our advisors were able to directly ask questions about offering cash balance plan design alternatives.

We look forward to working with Pinnacle Plan Design for years to come. We think of them as **part of our team** and would recommend their services without hesitation.

▶ **Cindy Burnett, Retired COO**
Retirement Plan Administrators, LLC | Atlanta, GA

We have used Pinnacle Plan Design's actuarial services for a number of years. We have always found their work to be **innovative** and well-suited to our clients' needs.

▶ **Phyllis P. Rimkus, Retired Owner**
Rimkus, Marciano & Associates, Inc. | Rochester, NY

MVP was first introduced to Pinnacle in 2005. MVP serves as the TPA on our 401(k) plans, while Pinnacle serves as the actuary for these same clients' defined benefit plans.

We were impressed from the start at their ability to provide **accurate and timely actuarial services**. They have an incredible ability to craft defined benefit plan designs to meet the objectives of our clients, offering consultation and guidance throughout the life of the plan. They develop **unique and customized solutions**, while still remaining focused on plan compliance.

They have always been a valued partner in the service to our clients!

▶ **Mark Vaughn, VP & CFO**
MVP Plan Administrators, Inc. | Cary, NC

We have engaged the services of Pinnacle Plan Design, LLC for several years. This has permitted us to expand our product offerings to include Cash Balance and Defined Benefit plans. The expertise and access to their actuaries has given us the confidence to provide these plans to our DC clients.

Their **quick turnaround** with year-end work, as well as prompt answers to tricky client situations, has proven to be a successful partnership. Pinnacle has allowed us to make defined benefit plans easy for our clients.

▶ **Barbara Leadem, Past Owner**
Atlantic Pension Services, Inc. | Philadelphia, PA

You *quickly* turn work around for your clients...

Shouldn't your actuary do the same for you?



CASH BALANCE PLANS • TRADITIONAL DEFINED BENEFIT PLANS

Meet Pinnacle's Actuaries



Lynn Young, EA, FSEA
Consulting Actuary, Partner

- Recipient of the ASEA Ed Burrows Distinguished Achievement Award (2022)
- Recipient of the ASPPA Educator's Award (2022)
- Specializes in cash balance plans for closely-held firms
- Board Member, American Retirement Association (2027 President)



Andrew Forgrave, FSA, EA, MSEA
Consulting Actuary, Partner

- Specializes in the administration of small- to medium-sized defined benefit plans, including plan termination cost-benefit analysis for frozen DB plans



Kevin Donovan, EA, FSEA, FCA
Consulting Actuary, Senior Advisor

- Recipient of the ASEA Ed Burrows Distinguished Achievement Award (2019)
- Recipient of the ASPPA Educator's Award (2015)
- Leading national speaker and published author in the cash balance plan field



Scott Basco, FSA, EA, MSEA
Consulting Actuary

- Specializes in actuarial consulting and defined benefit administration



Grand Dozer, EA, MSEA
Consulting Actuary

- Specializes in actuarial consulting and defined benefit administration



Joe Nichols, EA, FSEA, ASA
Sr Manager, Actuary

- Specializes in defined benefit plans, combination plans & governmental pension plans



Kevin Strauch, EA, MSEA
Consulting Actuary

- Specializes in actuarial consulting and defined benefit administration



Charity Westphal, EA, MSEA
Consulting Actuary

- Specializes in actuarial consulting and defined benefit administration

Cash Balance & Traditional Defined Benefit Thought Leaders

Authorship

Pinnacle's actuaries have authored the 2016-2024 Editions of the Defined Benefit Answer Book

Published by:



Defined Benefit
Answer Book

Wolters Kluwer

National Speaking Engagements

Pinnacle's actuaries train Enrolled Actuaries and other pension professionals from around the country on technical cash balance plan issues at annual industry conferences hosted by the following organizations.



For more information, contact:



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CEO



Bill Presson, ERPA, QPA, QKA
Senior Manager

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