

Benefit Advisors

THIRD PARTY ADMINISTRATION SERVICES

As a business owner, you understand that your people are your greatest asset. Having a great retirement plan is one of the best ways to attract and retain top talent. Providing a quality retirement plan and promoting financial wellness creates happy employees - and happy employees are more productive, which helps increase profitability. That's a win-win for everyone!

That's why Aprio's Benefit Advisors team puts your employees at the center of the equation. We provide comprehensive services including plan design, plan administration and plan integration.

We work closely with clients to maximize the value of their retirement plans and make it easier to offer this important benefit. Let us help you make your retirement plan a cornerstone of your employment brand that can help you grow your workforce and your business.



Aprio Benefit Advisors services include:



Design

We take the time to understand the specifics of your business model, then build a plan that best suits your needs. We include all key considerations, such as employee age and years of service in developing appropriate retirement plan recommendations.



Administration

Your Aprio team includes a dedicated plan consultant to ensure your retirement plan objectives are met. Under the direction of your personal plan consultant, your Aprio team:

- Calculates contribution amounts that meet your company objectives
- Implements rigorous quality controls to keep your plan in compliance
- Provides a complete administration package, including a signature-ready Form 5500 and related schedules
- Maximizes your tax deductions while keeping your overall costs low



Integration

Coordinating the various professionals involved in your retirement plan can be challenging. Our experienced in-house coordinators work with your other advisors (accounting, financial, custodial) to build a cohesive team that works efficiently and effectively to meet your plan goals.

Aprio Benefit Advisors is positioned to provide you with the hands-on, customized services that the other providers seldom offer.

BENEFIT ADVISORS BY THE NUMBERS

Our goal is to bring you the best team, so we maintain a staff of well-trained, experienced professionals who develop one-on-one relationships with our clients. Our average team member has over 15 years of industry experience and over 15 years with our firm. Most Benefit Advisor team members have their Actuarial or Qualified Pension Administrator designation from the American Society of Pension Professionals & Actuaries, and our entire team takes part in a comprehensive continuing education program.

Over
500
Qualified Plans

More than
13k
Participants

Almost
\$1b
In Plan Assets*

Team Member
15yrs
Average
Experience

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About Aprio

Since 1952, clients throughout the U.S. and across more than 40 countries have trusted Aprio for guidance on how to achieve what's next. As a premier, CPA-led professional services firm, Aprio delivers advisory, assurance, tax and private client services to build value, drive growth, manage risk and protect wealth. With proven expertise and genuine care, Aprio serves individuals and businesses, from promising startups to market leaders alike.

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