



PenSys

QUALIFIED RETIREMENT PLANS

“Improving retirement outcomes through Qualified Retirement Plans”

PenSys is dedicated to helping businesses meet the challenge of providing meaningful retirement benefits with flexible, low cost competitive solutions and superior customer service.



By adhering to three principles – **Personal Service**, **Targeted Solutions** and **Advanced Technology** – PenSys has become a nationally recognized independent Third Party Administration firm focused on the *Design, Implementation, Administration* and *Recordkeeping* of qualified retirement plans.

Since our inception in 1995, PenSys has been offering flexible solutions to all business types and sizes. Whether a single Self-Employed individual, or a corporation with hundreds of employees, PenSys will design and administer a retirement plan tailored for your specific needs.

Today, PenSys is among the largest benefits administration firms in California. Headquartered in Sacramento with regional offices in Fort Collins, CO and Charlotte, NC, PenSys now supports clients in 40 states throughout the country.

PERSONAL SERVICE



Service seems to be a lost art for most companies. Not so at PenSys. Each of our clients is assigned to an experienced Administrative Consultant whose only function is to ensure the smooth operation of your retirement plan. Our Administrative Consultants build a close relationship with their clients, developing an understanding of each client's unique circumstances. This personal service model means that you will have a single point of contact to answer your questions year in and year out.

To ensure our Administrative Consultants are available to you, each one is supported by a group of retirement plan specialists who possess the expertise to address every plan's changing needs. Working together in a team environment, this group of specialists includes:

- Design Specialists
- Valuation Specialists
- Document Specialists
- Actuaries
- Recordkeeping Specialists
- Software Specialists

Over 1,500 clients nationwide rely on PenSys for accuracy, timeliness, reliability and stability.

TARGETED SOLUTIONS

Businesses come in all shapes and sizes, each with differing goals and objectives.

While there are many “off the shelf” and “generic” retirement plans, PenSys believes that your retirement plan should be specifically designed to meet the unique characteristics of your business.

Whether you’re an individual Self-Employed business looking for a way to secure your retirement, or a small business owner looking to maximize benefits for yourself and certain key employees while managing overall plan costs, PenSys can create a retirement program that will meet your objectives. We will create a retirement plan around your needs, which will be well received by plan participants, will ease the administration burden on your staff and will be flexible in the years to come.

ADVANCED TECHNOLOGY



Technology should enhance personal service, not replace it. In addition to proprietary software developed to manage your plan, PenSys utilizes state-of-the-art third party technology in an open architecture platform that allows access to thousands of mutual funds to meet the needs and sophistication of your plan participants. Our independence from investments allows you and your advisors greater control over investment performance and overall plan costs.

Our in-house 401(k) recordkeeping system provides online access for plan participants and allows them to monitor their accounts, make changes when necessary and become self sufficient. Plan sponsors are also provided online access to participant information and plan level reporting. Our use of technology ensures a dynamic retirement program flexible enough to change when your needs change.

How can we help you improve your retirement outcome?

To find out how PenSys can help you create a successful retirement plan for your business, contact us:

PenSys Corporate Headquarters

2233 Watt Avenue, Suite 330

Sacramento, CA 95825

916-567-3106

info@pensysinc.com

www.pensysinc.com

