



Retirement Plan Specialists, Inc.

Welcome Back!

A former customer has a cash balance plan that we designed and administered for several years. They decided to look around for another TPA that would do the work at a cheaper rate. However, they soon became unhappy with the service that they were getting. They didn't realize the value added services that we provided to them:

- Onsite Actuarial Services. Our own Enrolled Actuary reviews and certifies all of our defined benefit plans. This allows us to provide a faster response to questions that clients have on their retirement plans.
- All 4 of our administrators have an ERPA (Enrolled Retirement Plan Agent) designation. This designation allows us to represent clients in front of the IRS, just like a CPA or attorney. There are only 20 ERPAs in Florida – 20% are located in our office!
- We attend various continuing education seminars throughout the country to expand our retirement plan knowledge and to remain on the cutting edge of rules and regulations.

So, that old adage 'you get what you pay for' does ring true. We have welcomed them back as a client and look forward to servicing their cash balance plan for many years to come.