

# Why Choose Pentegra for Your Cash Balance Plan?

## Our legacy of excellence

Pentegra offers a comprehensive array of creative plan design, strategic consulting, professional actuarial practice and end-to-end plan administration for your cash balance plan. Our unique structure affords complete independence and flexibility to work with all plan partners seamlessly.

We take a thoughtful and creative approach to plan design, delivering highly customized solutions based on your needs. Our seasoned team of actuaries goes beyond number crunching to better understand the unique dynamics of your organization and how your cash balance plan can be maximized to best achieve your goals.



### A legacy built offering defined benefit plans

- More than 80 years of defined benefit plan expertise
- Skilled in complex plan designs
- Nearly 500 defined benefit plans managed
- Over \$4 billion in defined benefit assets under administration/management



### We're CEFEX certified

Pentegra is a Centre for Fiduciary Excellence (CEFEX) Certified Administrator, demonstrating our commitment to a standard of excellence and best practices. Pentegra is part of an elite group of firms in the nation that has successfully completed the independent certification process for TPA service providers.

## A fiduciary first

Our 80-year heritage as an institutional fiduciary guides everything we do, delivering a high standard of care and deep expertise to drive successful retirement plan outcomes.



### A consultative, strategic approach

We offer a consultative and strategic approach to plan design, developing and understanding of benefits philosophies and cost and benefit objectives, peer analysis and competitive considerations.



### The bench strength of a tenured and highly credentialed team

Our experienced team of Enrolled Actuaries, ERISA attorneys, ASPPA-certified consultants, fiduciary and compliance specialists serve thousands of complex retirement plans nationwide and deliver among the highest level of expertise and technical support in the industry today.

Contact a Pentegra representative today at 855-549-6689 or [solutions@pentegra.com](mailto:solutions@pentegra.com)

[www.pentegra.com](http://www.pentegra.com)

<http://316fiduciaryday.com/>

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