

OUR DIFFERENCE IS YOUR ADVANTAGE

PENTEGRA'S ACTUARIAL SOLUTIONS



A CREATIVE AND COLLABORATIVE ACTUARIAL PERSPECTIVE

Pentegra offers a full range of actuarial and administrative services with a tangible difference—ours is a creative approach that delivers unique solutions to the challenges that come with offering a defined benefit plan today.

Our actuaries go beyond number crunching to work collectively for the best interests of our clients. Our goal is to help you better understand the unique dynamics of defined benefit plans. Our seasoned team of Enrolled Actuaries works with clients to translate technical concepts into common sense benefit practicalities and helps quantify the long term implications of the decisions you make today. Our process is built on stringent quality standards and continuous peer review process to deliver actuarial work of the highest standard.

You choose the services that are right for your plan. Our flexible arrangement can include your existing recordkeeper, trustee or investment manager.

- Annual actuarial funding valuation report, which includes development of the minimum funding and maximum tax deductible contribution amounts
- Annual Certification of Funded Ratio
- Preparation of the Annual Funding Notice
- Preparation of Form 5500 Schedule SB Calculation of and assistance with the PBGC premium payment and filing due each year
- Participation and Coverage Testing as well as Non-discrimination Compliance testing
- Preparation and reconciliation of the present value of accumulated benefits in accordance with FASB ASC 960
- Calculation and reporting of FASB ASC 715 expense and year-end disclosure financial information, including curtailment and/or settlement accounting
- Plan design assistance
- Actuarial experience studies
- Nonqualified plan services including FASB ASC 715 expense and year-end disclosure financial information
- Monitoring of benefit restriction thresholds and contribution strategies to avoid benefit restrictions
- Benefit calculations
- Preparation of annual benefit statements
- Second opinion actuarial review

Learn more about Actuarial Solutions. Contact the Pentegra Solutions Center at solutions@pentegra.com, or 855-549-6689.