

Pentegra's 3(16) Fiduciary and Consulting Services

Running a retirement plan can be challenging. Pentegra's Consulting Services are designed to help solve plan challenges—for you and your clients.

As a CEFEX-Certified TPA, we hold ourselves and the work we do to the highest standards. As part of our process, we regularly review plans and often identify issues with prior plan administration that need to be corrected for plans to remain compliant. Our fiduciary approach helps ensure potential problems are uncovered and resolved before they become issues.



We fix what others fear.

With our extensive experience as a 3(16) administrative fiduciary, Pentegra can identify issues that often elude others. We're skilled at finding plan issues before they become problems—saving clients hundreds of thousands of dollars in fines and penalties. In the last year alone, Pentegra has helped clients file countless corrections with the IRS, resulting in savings of over \$1M in fines and penalties for these clients.





We're comfortable working outside of the box

We're agile when it comes to out-of-the-box features, and practiced in plans that others won't touch—including highly complex plans with separate asset sources, combined plan testing and plan document and qualification issues.



We go beyond traditional TPA services

We offer a consultative and strategic approach to plan design. We take a deeper dive, developing an 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 highly qualified 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.



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 and a culture of good governance and oversight. Pentegra is part of an elite group of firms in the nation that has successfully completed the independent certification process for TPA service providers.

Pentegra. The peace of mind having a professional on board provides.

Learn more about our Consulting Services. Visit us at www.pentegra.com or contact the Pentegra Solutions Center at 855-549-6689 or solutions@pentegra.com.

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