

PBRetire for Employees

Primark Benefits is an independent Third-Party Administrator (TPA) and recordkeeper helping employees achieve their retirement goals. By working with Charles Schwab, we offer an ideal combination of technology, expertise and support to help you make informed decisions about your retirement plan.

PBRetire Advantages

◆ Complete Independence Through Open Architecture Platform

Your plan advisor can build a well-diversified investment menu from over 10,000 mutual funds without being limited to a single fund family or an insurance company.

◆ Unparalleled Expert Advice

When you call us with a question or concern, you will be talking to retirement plan experts who can guide you—from investment choices to optimal withdrawal options pertaining to your individual situation. For example, rather than asking you whether you want a loan application or a hardship withdrawal form, we will advise you on the various tax implications of each option so that you can make informed decisions.

◆ Personal Service, Not Automated Replies

When you call our office or send us an email, you will not get an automated reply saying “someone will respond to you in

the order your request was received.” Instead, you will reach a real person and receive real answers to your questions. If we are not available when you call, you’ll hear back from us usually within an hour.

◆ True Transparency

We disclose all of our fees to you, and nothing is hidden. You buy all of the funds offered in your plan at NAV, and there are no asset wrap fees hidden in your purchases.

◆ Safety and Security Of Your Retirement Account

With Charles Schwab Trust Company as your plan custodian, you can feel confident knowing account assets are protected by a wide-ranging combination of safeguards. Along with Schwab, we are committed to safeguarding your account assets and to the privacy of your information. We continually review our security practices with your protection in mind.

Contact:

Current Clients

650-692-2043

pbretire@primarkbenefits.com

New Accounts

833-987-2315

retirewell@primarkbenefits.com

Why Primark Benefits

- ◆ **EXPERIENCE:** We've been in business since 1971
- ◆ **EXPERTISE:** Our credentialed staff are experts and leaders in the field
- ◆ **ACCURACY:** We have rigorous quality control and a compliance dept
- ◆ **ATTENTION:** Your satisfaction is our priority

Also speak with us about how we can coordinate **all** your employee benefits and services including: retirement, health insurance, flex plans, COBRA, and even payroll processing!