

Advanced Plan Situations And Corrections Programs

We're proud of the deep bench of knowledge held by our plan consultants and administrators. We are here to help you with the day to day operation of your retirement plan, but we can also help with more advanced planning, and keep (or get you out of) trouble.

Special Situations

- ◆ Multiple plans for separate business departments/units, with different features
- ◆ Roth only & Roth conversion plans
- ◆ After tax deferral plans
- ◆ Controlled group of companies that each want their own plan
- ◆ Multiple employer plans
- ◆ Unusual assets, including:
 - ◇ Rental property/real estate
 - ◇ Fine art
 - ◇ Deeds of trust/promissory notes
 - ◇ Limited partnerships
 - ◇ Private equity
 - ◇ Brokerage accounts
- ◆ Frozen plans
- ◆ Staffing/Outsourcing organizations
- ◆ Affects of a merger/acquisition on a plan
- ◆ Executive Compensation plans that allow for IRA rollovers at retirement
- ◆ Retirement plans as a succession tool
- ◆ And many more!

Plan Corrections and Forgiveness

Everyone makes mistakes! Fortunately, the government wants retirement plans to stay in compliance with the rules. We can help a plan come back into compliance using self correction procedures, or when appropriate, through the more formal governmental channels. Here are just some examples:

- ◆ Missing or out of date plan documents
- ◆ Failure to timely deposit employee deferrals and loan payments
- ◆ Failure to file Form 5500 when required
- ◆ Failure to process a loan or distribution properly
- ◆ Incorrect exclusion of eligible participants
- ◆ Failure to make timely plan contributions
- ◆ Contributions we're above the maximums allowed
- ◆ Failure to give eligible participants the opportunity to defer

Contact:

Current Clients

650-692-2043

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New Accounts

833-987-2315

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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