



Haynie & Company

Certified Public Accountants
& Management Consultants

TPA Retirement Plan Services

Darin J. Fullmer, CPA, CRPS
Haynie & Company

Benefits of a Haynie Third-Party Administrator

CUSTOM SOLUTIONS

When it comes to employer-sponsored retirement plans, every situation is different. Whether your goal is to attract and retain the best employees or maximize retirement plan contributions and tax savings, Haynie & Company is uniquely qualified to help you tailor your company's retirement plan to your specific needs. Our custom solutions adapt as your business needs grow and change.

LESS WORRY

Retirement plans are a highly technical field and keeping up with industry changes, best practices, compliance, and other administrative burdens can be overwhelming. Working with Haynie & Company as your TPA means less for you to worry about when it comes to regulatory oversight from the Department of Labor and Internal Revenue Service.



HAYNIE & COMPANY CAN ADMINISTER:

- 401(k) plans
- 403(b) plans
- Profit sharing plans, including integrated and cross-tested plans
- Defined benefit plans, including cash balance plans
- Combo 401(k) and defined benefit plans

SUPPORTING YOUR BUSINESS WITH:

- Retirement plan setup
- Annual plan administration
- Consulting
- Participant transactions

How Can Your Haynie TPA Help?

PLAN SETUP

- ◇ **Plan Design** – We tailor the retirement plan design to fit the employer’s needs. Common design provisions include eligibility, vesting, employer contributions, compensation definitions, and plan distributions.
- ◇ **Plan Documents** – We draft legal documents that govern the operation of the retirement plan. These documents include the adoption agreement, summary plan description, trust agreement, and IRS determination letter.
- ◇ **Plan Installation** – We work with your financial advisor and recordkeeping provider to ensure that the plan is properly installed.

ANNUAL PLAN ADMINISTRATION

- ◇ **Annual Census** – We request and review your annual payroll census data.
- ◇ **Testing** – We perform the annual nondiscrimination, coverage, and top-heavy testing.
- ◇ **Reporting & Trust Accounting** – We reconcile participant accounts, prepare the year-end reporting package, prepare the annual Form 5500 and attachments, and furnish the summary annual report.

CONSULTING

- ◇ **Amendments** – We work with the plan sponsor to identify and implement plan amendments as necessary.
- ◇ **Maximizing Contributions** – Based on the plan sponsor’s needs, we will help maximize retirement plan contributions and potential tax savings.

PARTICIPANT TRANSACTIONS

- ◇ **Distributions** – We authorize participant distributions from the plan, including required minimum distributions. We can also prepare Form 1099-R and Form 945.
- ◇ **Loans** – We authorize participant loans, prepare the loan amortization schedules, and administer the loans.