Retirement Plan Solutions

Are you looking for a competitive edge to help distinguish your retirement practice from the rest? Look no further.

Flexibility, control and choice are all part of the plan.

We get it. Your clients' financial concerns and fiduciary responsibilities keep you up at night. Does their retirement plan have the right investment strategy? Do they have the proper fiduciary governance protocols? Does their plan design meet their needs and goals? Are their participants engaged? You may not have all the answers, but you do have us.

When it comes to making your business stand out, having the right partner can make all the difference. Sentinel Group has the products, resources and technologies you need to compete—and win. We are uniquely positioned to help advisors provide innovative, cutting edge solutions for their clients' retirement plan needs.

Partnering with us gives you a competitive edge. We'll work closely with you to develop the most appropriate retirement plan solution for your clients, but in a nutshell, you'll continue to deliver consulting and compliance testing, and we'll provide the investment platform, website and trading technologies. Additionally, you will discover that our in-house experienced and highly trained professionals are consistently focused on you and your clients' specific needs—think of our benefit consultants, actuaries and ERISA attorneys as an extension of your team.

How we help your practice.

- **Personal relationships.** Your dedicated team at Sentinel will be your partner from day one; you'll know us and we'll know you.
- **Plan design expertise.** Let our team of over 30 credentialed professionals and two ERISA attorneys help you design the most effective plan for your clients.
- **Sales support.** We have the capability to create co-branded plan service proposals to make it easier for your prospects.
- **Dynamic plan reporting via our online dashboard.** See all your clients in one place and gain access to plan measurements that include participant engagement and retirement readiness analytics to help tell your story.
- **Financial wellness education.** Access to a library of articles, videos and an online step-by-step program designed with a proven track history of producing lasting behavior changes to help employees get out of debt, on a budget, and on their way to saving for retirement.
- **Annual Disclosure Reporting.** Let Sentinel help you meet the requirements of your 408(b)(2) obligations through our integrated disclosure communication process.

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Our open architecture solutions

- Daily plan valuation and on-going account rebalancing
- Onsite and fully staffed Service Center
- Convenient online portal for participants and plan sponsors
- Annual compliance testing and signature-ready IRS Form 5500
- Plan document management
- Auto-enrollment and auto-escalation solutions
- Online beneficiary management
- Online and paperless enrollment, loan and distribution services
- Customizable reporting

Sentinel has over 35 years of experience in recordkeeping, third party administration (TPA) and compliance services. But, what sets us apart is that we understand your business as well. Our sister company, Sentinel Pension Advisors, is our largest client. We believe this first-hand knowledge and familiarity helps us provide better service to our advisor partners. How? We understand the pressures of being a 3(21) or 3(38) advisor in today's climate,
and we know how to help. Our mission is to serve you and protect the business you have built.

Our custody partners

- Fidelity Investments
- Charles Schwab
- Matrix Clearance & Settlement
- Mid-Atlantic Trust Company (MATC)
- Pershing

What we do

Retirement Plan Administration

- Defined contribution (401(k), 403(b) and 457 defined benefit)
- Profit sharing
- Prevailing wage
- Non-qualified deferred compensation
- Employee Stock Ownership Plans (ESOPs)
- Consulting and actuarial services
- 3(16) Administration

Health & Welfare Plan Services

- Flexible Spending Accounts (FSAs)
- Health Reimbursement Accounts (HRAs)
- Health Savings Accounts (HSAs)
- Transportation Reimbursement Plans
- COBRA/HIPAA administration
- Form 5500 Tax Reporting
- Premium Only Plans (POPs)

Our Purpose

...To make benefits EASY:
Easy for your people.
Easy for your business.
Easy for you.

From retirement plans to group health insurance to reimbursement accounts to financial planning—we've got you covered.

Facts & Figures*

- Over 5,000 Clients and 240,000 plan participants served
- 1,919 retirement plans and 774 health & welfare plans administered
- $13.3 billion in assets under recordkeeping administration

Contact Us

For more information or a full proposal, call us at (800) 436-6689. Or visit us online at **sentinelgroup.com**.

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*As of 6/30/2024
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