

MY YEARLY ADVANTAGES

With Benetrends

Find out more, call (267) 498-0059 or visit benetrends.com

WHO IS BENETRENDS?

Benetrends is the architect of the innovative ROBS (Rollovers as Business Start-Ups) financing solution and a leader in comprehensive retirement services, helping entrepreneurs fund their business dreams without debt. With more than 40 years of expertise, we offer a wide range of retirement planning and funding solutions, providing ongoing support and expert guidance to ensure the success of your entrepreneurial journey.

WHAT IS AN RPA?

An RPA (Retirement Plan Analyst) at Benetrends is integral to managing your retirement plan, ensuring compliance with regulatory standards, and providing expert advice to optimize your retirement goals. After transitioning from the Sales and New Business teams, every client at Benetrends is assigned an RPA who will handle daily administrative tasks, assist with distributions, and oversee the annual data collection. While the RPA facilitates the completion of Form 5500 and other processes, you may interact directly with your RPA without seeing all the behind-the-scenes activity that ensures seamless management of your retirement Plan.

WHO IS MY RETIREMENT PLAN ANALYST (RPA)?

Find your Benetrends Analyst by logging in at [Benetrends.plansponsorlink.com](https://benetrends.plansponsorlink.com) or by calling us at 267-498-0059. We are available to assist you with your needs.

WHAT DOES BENETRENDS DO FOR ME ONGOING?

- 1 Continuous Plan Support**
We manage your plan to enable additional rollovers and maintain tax-deferred status, allowing continued funding for your business, just like your initial setup.
- 2 Regulatory Compliance Maintenance & Updates**
We routinely update your plan documents to meet the latest IRS and DOL regulations, ensuring full compliance.
- 3 Benetrends Rainmaker (ROBS) Guarantee**
Benefit from our commitment to your success; details available [here](#).
- 4 Comprehensive Ongoing Administration**
Our services include, but not limited to:
 - Annual compliance testing
 - Filing of Form 5500
 - Employer contribution calculations and funding
 - Issuing required participant notices
 - Account reconciliation
 - Consulting on plan design to meet retirement goals

