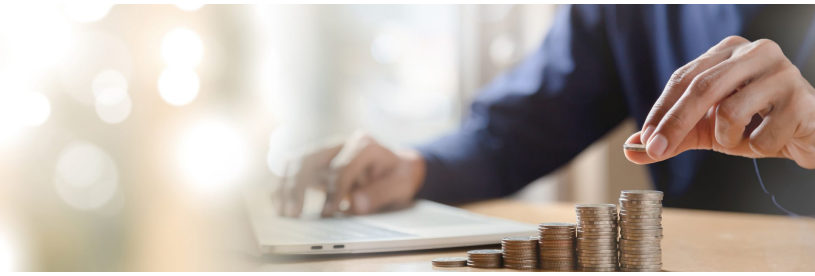
Retirement Plan Services



WE ARE YOUR STRATEGIC PARTNER FOR YOUR BUSINESS' RETIREMENT PROGRAM

Through our retirement plan services for businesses, we provide consulting, compliance, and advisory services for sponsors of qualified retirement plans. Our experienced professionals stay current with the complex legislative and regulatory requirements in the retirement plan area to ensure that your plans are always in compliance. Our commitment to quality, proactive communication, responsiveness to client needs, and teamwork approach creates a service-delivery model ideal to service your needs.

Johnson O'Connor offers a full range of tailored services for retirement plan administration to provide you a comprehensive solution, including creative plan design, plan document preparation including necessary amendments, recordkeeping, tax return preparation, and other related plan consulting matters. Proper plan design can offer maximum benefits to owners and other key employees while managing contributions for other employees, or otherwise be designed to meet the goals of the plan sponsor.

We can partner with your investment advisor and work with numerous retirement platforms, pooled investment accounts, and we can administer plans that offer participant-directed brokerage accounts. We are here to be your strategic partner for your business' retirement needs.

Our retirement plan services include:

- Retirement Plan Design
- Plan Administration & Compliance
- Consultation on IRAs
- Retirement Plan Compliance, Form 5500 & Design Assessments
- Plan Document Preparation & Maintenance
- Tax Return Preparation
- Plan installation
- Defined Benefit & Cash Balance Plans

MEET THE TEAM

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