



AFG Pension Administration

Suite 301
575 Pierce Street
Kingston, PA 18704-5700

P: (570) 714-0720
P: (800) 491-2726
F: (570) 714-0744
E: info@AFG-Pension.com

AFG Pension Administration is an independent third-party administrator (TPA), specializing in designing, developing, installing, and administering retirement plans. Our integrated approach saves you time and money while helping your employees save for retirement.

Qualified retirement plans can provide many benefits for your company and employees. But, administration of these plans is a complex and confusing process. Employing an independent TPA can take the confusion out of plan administration by providing the consulting and technical expertise you need in order to properly operate your plan. With AFG as your TPA, we can assist you with the following services and contribute to the success of your plan:

Installation and Plan Set-Up	Annual Administration
Initial consulting services Plan Design & Installation for: 401(k); Safe Harbor; Profit Sharing; New Comparability; Age Weighted; Integrated Money Purchase; Defined Benefit; Target Benefit; 457 Deferred Compensation; 412(i) Preparation & Implementation of Plan Adoption Agreement Obtaining Plan Document & Trust Summary Plan Description Booklet Assistance with Enrollment Meetings Gathering of transitional plan information Loan Takeovers Input of Plan data management services	On-going Plan Document Compliance Compliance Testing Services for: - Discrimination Testing (ADP/ACP) - Top Heavy Calculations - 415 Maximum Annual Additions - Plan Coverage Testing Profit Sharing, Cross Testing Calculations ERISA, DOL & IRS 404(c) Compliance Maintenance of Employee Census Data Vesting Calculation & Maintenance Eligibility Determination with Broker notification Annual Report Valuation including SAR Accounting for employer/participant contribs. Work collectively with your company accountant IRS Form 5500 Tax Filings and Schedules Calculation of age 70 ½ RMD distributions Toll-free 800 & Web Access to TPA
Additional Services	
Processing of Withdrawals/Distributions Hardship Withdrawals Loan Payments Initial Loan Set-ups	Implementation of Qualified Domestic Relations Orders (QDRO) Tax Reporting Forms 1099R Fidelity Bond Coverage

AFG Pension Administration . . .

- When you need personalized service . . .
- When you need efficient and cost-effective pension administration . . .
- When you need to relieve the burden or concerns associated with the day-to-day operation of your pension plan . . .

Visit us at www.AFG-Pension.com and complete the questionnaire and census for a no obligation proposal and review of your retirement plan.

