



EMPLOYER RETIREMENT

QUALIFIED RETIREMENT PLANS/401(K)

By offering a great 401(k) plan, you'll help your employees and yourself save for retirement. But giving employees this benefit does mean you, as a Trustee, will have extra responsibilities:

Plan Design and Setup

Document your plan, coordinate contributions with your payroll provider and custodian, and act as a fiduciary.

Enrollment and Education

Explain your plan to your employees, educate them on investment options, and give them timely notice of plan changes.

Administration and Recordkeeping

Deduct contributions from payroll and deposit them with the custodian. Make employer contributions, and keep track of transactions.

Compliance and Reporting

File IRS Form 5500 and complete compliance testing annually.

Investment Management and Monitoring

Choose a provider and a selection of investments. Ensure investments are chosen and maintained with the best interests of employees in mind.

The list of responsibilities is pretty long, which is where we come in. Allow Carillon Group to do a lot of the heavy lifting and take most (or all) of these responsibilities off your to-do list.



Questions?
(636) 777-7001