Coleman&Associates

Fully Integrated Tax, Accounting & Financial Services

Retirement Plan Services and Support

As a small-business owner, you know the challenges of attracting and retaining the best employees which includes providing attractive retirement benefit plans. But many small business owners are overwhelmed by the possibility of administering a company sponsored retirement plan. And of those business owners who have established a company retirement plan, many of them feel that they and their employees do not receive enough personal attention from their financial professional.

The Financial Consulting Team at Coleman & Associates strives to provide a superior level of personal service to our retirement plan sponsors and their employees. The support we offer to your small business is led by Rebecca Coleman and supported by Patti Maher via a robust range of attentive services. Becky can help you to determine the right retirement plan for your business and give you some valuable tax breaks in the process.

Rebecca Coleman
Registered Representative

Patti Maher
Client Service Associate

Each client service plan is customized to your specific needs and considers all the following factors

- **Retirement Plan Selection** which best suits your business needs
- **Transition Support** to make changes to your existing plan or investments (if needed)
- **Fiduciary Education** to understand your fiduciary responsibilities
- **Customized Plan Materials** tailored specifically to the retirement plan options you have selected
- **Employee Enrollment Meeting** to educate your employees on the plan benefits and assist in the enrollment paperwork
- **Payroll Contribution Information** provided to the plan investment trustee after each payroll
- **Annual Census Information** and other tax filing information provided to the plan actuary (if required)
- **Loan Processing** support (if applicable)
- **Annual Plan Review** to educate you on any changes in the laws during the year and to confirm the plan and its investments continue to make sense for your business needs
- **Annual Employee Meeting** to provide enrollment assistance to newly eligible employees and an open forum for existing employees to ask questions or meet with Becky individually
- **Ongoing Investment Education** to help you and your employees meet your long-term goals
- **Easy Accessibility** to account statements and other plan information via 24/7 website access in addition to quarterly statements
- **Distribution Support** for employees who leave the plan

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