

Commitment to our clients

Our commitment to provide comprehensive quality services exemplifies our dedication to responding quickly to client needs and requests. From our largest plan to our smallest plan, we administer each one with the same superior level of care and concern.

When you select Trinity, you will find the solutions to your benefit needs. Our high standards of professionalism, technical expertise, and integrity ensure that you receive the highest level of services available.



Trinity Pension Group, LLC

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Plan Design
Document Services
Consultation
Employee Communications
Annual Administration



consulting, designing & processing

Trinity Pension Group, LLC (Trinity) provides third party administration for employer-sponsored retirement plans. Since 1994, our firm has been providing services, which include plan design, document services, consultation, employee communications and annual administration.

Trinity recognizes the complexities associated with reliable and effective retirement plan administration.

Through the most current developments in plan design and technology, we offer services necessary to make retirement plans successful.



A qualified retirement plan is required, through its plan administrator and trustees, to report certain activities to the IRS, to the Department of Labor, Pension Benefit Guaranty Corporation and to the plan's participants. In addition, federally regulated retirement plans may require consultation services for specific compliance issues and/or correction of operational failures. Trinity partners with the plan sponsor and their financial consultant to provide these required services for the following retirement programs:

Defined Contribution Plans

- Money Purchase Pension
- Profit Sharing
- 401(k)
- 401(k) Safe Harbor
- New Comparability 401(k) or Profit Sharing

Defined Benefit Plans

Simple Plans

- 401(k)

Plan Design-Feasibility Analysis

This is typically the initial phase for clients. Trinity's role is to demonstrate the advantages and disadvantages of each plan and then select a specific plan design for the client.

Implementation

Implementation involves preparation and delivery of the necessary documents to begin the program.

Employee Communications

When requested, Trinity's consultants are prepared to communicate the plan design features to the client's employees.

Annual Administration

Annual administration will typically include all services required throughout the plan year, as well as all required year-end reports.

Compliance Consulting

When laws change, Trinity's consultants will assist the plan sponsor to ensure their plan design is still appropriate.

Plan Termination

Trinity will consider the uniqueness in design coupled with the circumstances to determine the appropriate process for terminating the plan.