



Ascensus Consulting supports retirement plan third-party administrators (TPAs) with defined benefit and cash balance administration and actuarial services.

We partner with TPAs to:

- Provide defined benefit and cash balance plan document and administration services
- Provide illustrations of savings possible by varying plan design features and contribution amounts

When you choose to work with Ascensus Consulting, you gain the ability to offer insightful, reliable, and timely plan and related actuarial services to your financial professional and employer clientele without taking on the overhead of additional staff and related resources.

## Who is Ascensus Consulting?

Ascensus Consulting is a retirement administration, plan design, and actuarial firm that is wholly owned by Ascensus—the largest independent retirement and college savings services provider in the United States.

We bring more than 30 years of industry experience to providing services for over 4,000 retirement plans from four offices located in Florida, Indiana, and New Jersey.

With approximately 100 professionals who average more than 18 years of industry experience—including multiple enrolled actuaries in each of our locations—dedicated to designing and administering custom-built plan solutions, Ascensus Consulting offers a foundation of resources that you can rely on.

## What We Offer

- Plan design and administration flexibility
- Plan document with all required amendments
- Defined benefit/defined contribution actuarial support
- Custody flexibility
- Robust reporting on plan-related information
- Competitive & transparent pricing
- Maintain participant vesting for employer contributions
- Preparation of Annual Valuation Report
- Preparation of PBGC government filing (if applicable)
- Preparation of Annual Funding Notice (if applicable)
- Preparation of complete Form 5500

## Questions to ask yourself if you're already outsourcing your actuarial services

- Is your current actuary a one-person operation? Who is their backup?
- Do you have a contingency plan if your actuary situation changes?
- What is your strategy if you (or your outsourced actuary) gain more business than you can accept?
- Are you receiving quality responses and output from your current actuary?
- Are you happy with your current sales support? Or are you looking to add more experience and knowledge to your sales team?

## Why outsource to Ascensus Consulting?

- **Depth of Resources**

With our depth of resources, we can support you as you grow your defined benefit and cash balance book of business.

- **Breadth of Experience**

Our actuaries and pension professionals have the credentials, years of industry experience, and ongoing training that allow them to provide accurate and reliable services.

If you're already outsourcing to an actuary, we'd be happy to review their work to evaluate the accuracy and reliability of the information and reports they're providing.

- **Sales Support**

Ascensus Consulting's sales professionals can provide timely illustrations to support your defined benefit and cash balance sales efforts. With ready access to a team of in-house actuaries, they can easily research and provide illustrations for complex plan designs.

- **Cost Effectiveness**

We offer servicing to institutional partners at a discount to provide you pricing flexibility.

**Contact Ascensus Consulting for assistance, to request a pricing schedule, or set up a meeting.**

## Ascensus Consulting Sales Desk



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