



RETIREMENT PLAN SERVICES

You need a qualified retirement plan that is cost effective for you and attractive to your employees. Our skilled employee benefits department can help you design, implement, and administer a plan that fits your needs.

BUILD VALUE WITH A QUALIFIED RETIREMENT PLAN

Our dedicated team of employee benefits specialists meets with you to assess your objectives and review your employee demographics and budget in order to recommend an appropriate plan design. Once the plan has been implemented, we provide periodic document language amendments, offer guidance for timeliness of deferral and loan payments, prepare a summary annual report, and file Form 5500 to ensure that your plan meets IRS and Department of Labor compliance. We'll also help you establish proper record keeping procedures, perform non-discrimination testing, and fulfill participant distribution requirements and Form 1099-R reporting.

Whether you need a qualified retirement plan for two or 2,000 employees, Kemper CPA Group can help you design, implement, and administer a qualified retirement plan that complies with current legislation and provides value both to you and your employees.

WHAT WE DO

We provide you with compliance testing results for your plan that are easy to understand; however, our services do not stop there. We utilize the testing results to help you adjust your retirement plan to best fit your needs. Our ultimate goal is for your plan to operate as efficiently as possible, and we are proactive in making suggestions that align with that goal.

The types of plans we support are:

- Profit Sharing
- Defined Benefit Plans
- 401(k) Plans and Safe Harbor 401(k) Plans
- Simplified Employee Pension Plans (SEP)
- Savings Incentive Match Plan for Employees of Small Employers (SIMPLE)