

CBIZ

USA - Ohio



CBIZ Retirement Plan Services is a comprehensive retirement consulting, administration and actuarial team. We offer a complete suite of retirement solutions from over twenty United States locations, designed to help plan sponsors fulfill fiduciary duties and offer compliant, reasonably priced plans to participants. Our strength lies in our team and their ability to find flexible solutions to solve even the most complex plan problems.

Locations include: Atlanta, Boston, Bothell, Cleveland, Columbia, Cumberland, Denver, Houston, Kansas City, Lawrenceville, Minneapolis, Orlando, Overland Park, Philadelphia, Phoenix, Plymouth Meeting, Roanoke, San Jose, St. Louis, Torrance, Tucson, Uniontown, Woodstock

For more information: www.cbiz.com/retirement

CBIZ Retirement Plan Services is a trade name under which certain subsidiaries of CBIZ, Inc. (NYSE Listed: CBZ) market investment advisory, investment management, third party administration, actuarial and other retirement plan services. Investments, investment advisory and investment management services offered through CBIZ Financial Solutions, Inc., Member FINRA, SIPC and SEC Registered Investment Adviser, dba CBIZ Retirement Plan Advisory Services. Investment advisory and investment management services may also be offered through CBIZ Investment Advisory Services, LLC, SEC Registered Investment Adviser. Third party administration, actuarial and other consulting services offered through CBIZ Benefits & Insurance Services, Inc.



Member of the International Benefits Network

SERVICES OFFERED

Advisory

Investment selection, monitoring and replacement
Fee and expense benchmarking and negotiation
Fiduciary governance
Participant education and support
RFPs, conversions, and mergers & acquisitions

Administration

Pension Co-sourcing and Full Outsourcing

Administration system for benefits eligibility
Data Warehousing for participant pay and service history
Fulfillment and required mailing notices support
Participant online portal website access
Participant service center
Pension payroll, valuation and operations support
Plan sponsor portal website access
Plan sponsor reporting capabilities
QDRO Determination
Retirement and ongoing life event processing

TPA Administration

Distribution and loan processing

Actuarial

Pension Actuarial

FASB, GASB, and IAS reporting
Annual actuarial valuation (funding & accounting reports)
Actuarial assumption review
AFTAP certification and notice
Asset/liability studies
Data/asset reconciliation
Employee benefit statements
Stochastic and deterministic forecasts of contributions and expense
PBGC filings and annual funding notice
Lump sum windows, annuity buyouts, and other de-risking strategies
Plan terminations

Health Care Administration

OPEB, FASB, GASB, IAS valuation reporting
Actuarial assumption review
Claims cost development
Medicare Part-D attestation
Plan start-up, redesign and termination consulting

Filings, notices and reporting

Form 5500 and schedules

Non-discrimination testing

Payment processing

Plan audit support

Plan design services

Plan document services

Tax reporting

DETAILS

ADDRESS

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RESOURCES

[CBIZ Services Overview](#)