

CBIZ Retirement Plan Services

CBIZ Retirement Plan Services is a comprehensive retirement consulting, administration and actuarial team. We offer a complete suite of retirement solutions from over twenty 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. See below for a listing of some of the services we provide:

Advisory

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



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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
- Filings, notices and reporting
- Form 5500 and schedules
- Non-discrimination testing
- Payment processing
- Plan audit support
- Plan design services
- Plan document services
- Tax reporting

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 ACTUARIAL

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

PLAN TYPE: 401(k), 403(b), 457, 401(a), Profit Sharing Plans, Money Purchase Plan, Pension, Cash Balance, Non-Qualified (DC & DB), SERP, VEBA