



# RETIREMENT PLANS — VALUE ADDED SERVICES



## The Auditor's Toolbox®

A plan subject to the Employee Retirement Income Security Act of 1974 (ERISA) must file a Form 5500 annually for each plan that employs 100 or more eligible employees annually. This form also requires an audit of the plan and its' financial statements.

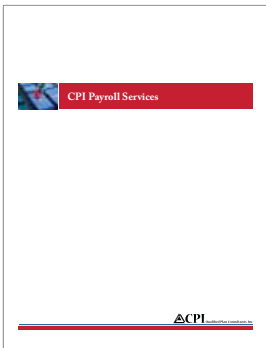
To make the audit process easier, CPI has designed and developed an innovative system we call the Auditor's Toolbox™. **The Auditor's Toolbox™ will provide information to help your accountant complete the plan audit effectively and efficiently.**



## Comprehensive Plan Review

The optional Comprehensive Plan Review is an annual report package that gives you everything you and your financial adviser need to critically examine the activity in your retirement plan over the last plan year.

**Reviewing your plan each year isn't just wise;** it demonstrates the steps you take to satisfy your fiduciary responsibility to the plan your company sponsors. The depth and scope of these reports give you and your financial adviser the information you need to manage your plan design for optimum advantage, plan participation for maximum effect, and plan assets for the best results.



## CPI Payroll Services

**The power of integrating company payroll with your retirement plan.**

With CPI Payroll Services, you receive complete, accurate, and affordable payroll service; simplifying payroll activities and allowing you to focus on your employees and the success of your business.

As a manager, you have many important responsibilities. Completing forms, filing taxes, and staying current with federal, state, and local tax laws are all necessary, yet cumbersome, payroll tasks. With each payroll cycle, CPI Payroll Services carries the responsibility of these payroll burdens for you.



## Common Remitter and Compliance Oversight Services

Medical | Educational | Judicial

As an independent third-party administrator, we offer a single turnkey 403(b) solution that meets all of the compliance requirements and accommodates a single or multiple vendor environment. The services we deliver through this venue is delivered with an uncommon commitment to quality. Working with ERISA and non-ERISA plans means we know Internal Revenue Service (IRS) and Department of Labor (DOL) requirements inside and out. It's our job. We know the requirements and make sure they are met, including the new 403(b) regulations.

To order a supply of any of our materials, contact us today at 800.279.9916 ext. 765.



