



The EZ Solution Program facts

Your Business ... POWERed by CPI

The EZ Solution a full-service retirement program available exclusively through CPI Qualified Plan Consultants, Inc. (CPI). This program is available to plans with 30 or fewer plan participants and provides the flexibility to accommodate 401(a), 401(k), 403(b)(7), and 457(b) plan types. Additional services and associated fees may differ based upon the plan type selected.

Program Features

Daily account valuation

Plan design consultation

Prepare/order enrollment material

Full plan document services

Summary Plan Description (SPD)

▲ Available in the English and Spanish languages

Online and/or paper enrollment

Coordinate conversion with prior recordkeeper

Assistance with the transfer of existing plan assets

Sample participant notification letter regarding the change of recordkeepers

Government-required participant Blackout Notice

Service and fee guarantees

Aggregate of 45 investment choices from more than 50 strategic fund family alliances and 5,000 mutual fund investment options

Automated contribution processing (ACH)

Payroll data formatted with eDataGate™ software

Full participant distribution services

▲ Checkwriting

▲ Preparation of Forms 1096, 1099, 945; if applicable

▲ Federal and State withholding, if required

▲ Calculation and notification of required minimum distributions

Plan Sponsor and Investment Professional interactive web sites

Participant services available in the English and Spanish language

- ▲ Interactive web site
- ▲ Participant Service Center
 - 7 AM to 7 PM central time

Loan modeling and loan requests online

Monthly ADP/ACP analysis in addition to annual ADP/ACP testing, as required

Form 5500 Series prepared signature-ready and filed for you with the Department of Labor (DOL) either electronically or by certified mail

Summary Annual Report

Call today. 800.279.9916 ext. 765



Quality Service

Guaranteed and Proven

Our service guarantee.

If for any reason you are not satisfied with our service, we will aggressively pursue an appropriate remedy. If you are still dissatisfied, we will waive next year's administrative service fees.

Our fee guarantee.

We guarantee that the administrative and service fees will not increase for 3 years from the date you engage our services.

How our customers feel.

CPI and CUNA Mutual Group have consistently received top rankings from both 401(k) Exchange and Boston Research Group for providing industry-leading service.

Serving your retirement plan needs since 1972.