



# A LEADING RECORDKEEPER FOR NONQUALIFIED PLANS

The Pangburn Group, a third-party recordkeeper exclusively for nonqualified benefit plans, is available to assist you from plan design through ongoing administration. Pangburn's customer experience and proprietary technology provide a unique offering in the industry. Pangburn serves businesses, nonprofit organizations, and financial institutions of all sizes in all 50 states and provides exceptional servicing on a fee-for-service only basis.

## WHY ENGAGE A RECORDKEEPER FOR YOUR NONQUALIFIED PLAN?

- Rules regarding nonqualified plans are complex and highly technical, requiring expertise to understand
- Penalties for noncompliance can be steep
- Specialized accounting and FICA tax calculations are required
- Provides a professional, third-party experience for participants, validating the benefit being provided

## PANGBURN COMPETITIVE ADVANTAGES:

- Client Experience: Focus on educating clients and providing proactive recordkeeping
- Proprietary Technology: Easily adapt to changing regulations and client needs
- Compliance Expertise: Exceed expectations with quality control and auditing
- Unbiased: Independent third-party not associated with selling plan assets
- Niche Market: Skilled at catering to small to mid-sized plans
- Fee-for-service: No commission sharing
- Unbundled: Providing clients complete flexibility in choosing the right partners for their plan

## PANGBURN RECORDKEEPING SERVICES:

Services provided by Pangburn include the following:

- **Plan Design, Conversion, & Compliance Reviews**
- **Accounting & Assistance with Specialized Tax Reporting**
- **Online Services (for applicable plan designs)**
- **Financial Institution Compliance**
- **Plan Sponsor Education & Participant Services**

## PANGBURN CONTACT INFORMATION:

Have a new prospect? Contact a New Business Consultant

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