We support your business from start to finish — on all retirement aspects of mergers, acquisitions and spin-offs.

- Pre-acquisition document deep dive on all qualified and non qualified plans
- Vendor search and RFP
- Design expertise in merging plans
- Deep dive on investments to create the best comprehensive menu moving forward
- Strategically designed participant education based on the next steps of the process
- Comprehensive retirement ideas to help reward, recruit and retain the key employees or cross testing plans

TOP 10 QUESTIONS TO TAILOR YOUR PLAN TRANSITION STRATEGY

1. If there's an entity being sold, what kind of transaction is it?
2. If the corporate action creates a severance of employment, will the acquiring organization allow participants to roll loans from their old plan to their new one?
3. Does the acquired organization offer a pension or nonqualified plan?
4. What's the objective for the acquired organization's plan
5. Is the acquired organization's plan in compliance, and are all the plan documents up to date?
6. Are there plans for extensive redesign after transition?
7. What's the all-in cost of the acquired organization's plan?
8. Is the investment policy statement up to date and in order?
9. If pension plans are in play, what does the combined asset liability analysis reveal?
10. If the organizational action is a divestiture has the exposure been properly accounted for?