

## Services We Offer

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### Plan Documents

Including SPD, Trust, and all Actions  
**\$3,500 for Individually Designed Plans**  
**\$2,500 for Volume Submitter Plans**



### Plan Amendments

Including SPD, Trust, and all Actions  
**\$250 for Amendment required by law**  
**\$500 for Amendment requested by the client or required to pass a failed test**



### Plan Submission

Including SPD, Trust, and all Actions  
**\$1,000 for 5300 Series filing**  
**\$200 for Demo 4**  
**\$800 for Demo 6**  
**separate fee quote for VCP or CAP filing**



### PBGC Form 10

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**Separate fee quote depending on the filing required**



### PBGC Forms Rep EAS, 500 and 501

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce pellentesque.  
**\$990 + \$10 per participant**



### Form 6088

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**\$240 + \$10 per participant up to the number required on the form**



### Distribution or Loan Package

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**\$250 for a loan**  
**\$500 for a hardship distribution**  
**\$200 for a DC distribution**  
**\$250 for a CBP force our distribution**  
**\$500 for a CBP distribution to an NHCE**  
**\$750 for a traditional DB or top 25 HCE CBP distribution**



### Form 5330

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce pellentesque.  
**\$400 + \$100 for each transaction reported**



### Actuarial Valuation

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**\$1,940 + \$60 per participant up to 10 + \$40 per participant over 10 up to 100 + \$25 per participant over 100**



### Form 5500

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce pellentesque.  
**\$500 + \$200 per schedule required**

**Note:** Rushed requests will be charged an additional \$100 per day



### Recent News

[Cash Balance Actuaries is now accepting new clients](#)

If you'd like to have personal service directly from a highly qualified small plan actuary at reasonable prices, Cash Balance Actuaries is the company...



### Financial Calculators

FIND OUT HOW MUCH YOU CAN SAVE BY INCREASING YOUR CONTRIBUTIONS AND MORE WITH OUR FINANCIAL CALCULATORS.  
**START CALCULATING**



### Ideal Case Studies

DO THESE EXAMPLES REMIND YOU OF YOUR BUSINESS?  
**READ MORE ABOUT OUR MOST COMMON CLIENTS**



### Get in Touch

CONTACT US BY PHONE, EMAIL OR BY FILLING OUT OUR FORM ONLINE

**CONTACT US**



## Not Yet a Client?

Suspendisse ultrices, neque at viverra varius, sem turpis interdum nulla, ac porttitor nisi metus molestie diam.

**TEST DRIVE OUR WEBSITE**

#### About Our Company

- + Company Overview
- + Fees & Services
- + Our Company Philosophy
- + Ways We Can Work Together

#### Resources & Articles

- + Why do I need a Pension Plan?
- + Am I a Good Candidate For a New Plan?
- + Should I Make Roth Contributions To My 401(k)?
- + What Is a Cash Balance Plan?

#### Contact Us

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**F 952.767.7600**  
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