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SPECIALIZING IN PENSION PLANS FOR SMALL BUSINESSES

ABOUT OUR COMPANY \* BENEFITS OF A PENSION PLAN \* SERVICES WE OFFER

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NEWS

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# 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, and all Actions \$250 for Amdendment required by law \$500 for Amendment requested by the client or required to pass a failed test



### Recent News

Cash Balance Acturaries 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



# Plan Submission

Including SPD, Trust, a \$1,000 for 5300 Series filing \$200 for Demo 4 \$800 for Demo 6 CAP filing separte fee quote for VCP o



### PBGC Form 10

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Separate fee quote depending on the filling required



## **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



# PBGC Forms Rep EAS, 500 and 501

Lorem ipsum dolor sit 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 \$25 a CBP force our si

**Actuarial Valuation** 

a CBP distrubution to an NHCE \$750 for a trad DB or top 25 HCE CBP distribution



# Form 5330

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\$400 + \$100 for each transaction reported



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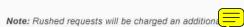
\$1,940 + \$60 per participant up to 10 + \$40 per participant over 10 up to 100 + \$25 per participant over 100



# Form 5500

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







# Not Yet a Client?

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TEST DRIVE OUR WEBSITE