



Third Party Administration

Pension Corporation of America (PCA) is a national retirement plan administration and consulting firm.

Locally-owned and member of the Alliance Benefit Group (ABG), PCA is positioned to provide customized administration to plan sponsors in the local Cincinnati and Dayton areas.

PCA is conveniently located 5 minutes from downtown Cincinnati, in the Eden Park area.

Please visit our website at www.pencorp.com for more information.

Advisory Services Offered Through
PCA Investment Advisory Services, Inc.
Securities offered through L.M. Kohn &
Company

10151 Carver Road, Suite 100
Cincinnati, Ohio 45242

Member FINRA/SIPC/MSRB and a
Registered Broker-Dealer not
affiliated with PCA Investment
Advisory Services, Inc.

PCA's Compliance Department is staffed to ensure that the defined contribution plans administered by the company remain in compliance with the rules and regulations set forth by the Internal Revenue Service (IRS) and Department of Labor (DOL).

General Compliance Department services provided include:

- Non-discrimination and plan coverage testing for current plan year
- Plan year testing *projections* to analyze future options
- Data analysis of Top Heavy determinations
- Annual contribution calculations to maximize Key Employee benefits
- IRS Form 5500 preparation (both small and large plan filers)
- Prepare/file various other government forms, including IRS Forms 1099-R, 945, and 5330.
- Coordination with plan sponsor and plan auditors to ensure timely audit packages and form filings.
- Research and response to IRS/DOL notifications and audit requests.
- Required Minimum Distribution (RMD) calculation and processing
- Research and communication of issues resulting from the release of new/updated compliance regulations
- Consulting services relating to plan design and document support
- Full Plan Document Services and annual updates