



COMPENSATION AND BENEFITS

Retirement Plan Services

Designing and administering a qualified plan is challenging. There are complex rules and guidance that must be followed. To complicate matters, there are often thousands of calculated transactions each pay period. Our qualified plan professionals can help you to understand these rules and assist with the transactions. Providing our clients with the guidance and direction necessary to comply with the numerous legislative and regulatory rules governing employee benefit plans is the cornerstone of our retirement plan consulting practice. Our experience and technical expertise allows us to offer the highest quality advice available to our clients.

Our Services



Retirement Plan Testing

- Nondiscrimination Testing for Complex Controlled Groups
- Qualified Separate Line of Business ("QSLOB") Testing and Analyses



Operational Review and Corrections Assistance

- Operational and Compliance Review
- Complex Correction Calculations



Vendor Search and Evaluation Services

- Identifying Record Keepers and Investment Advisors suited to your needs
- Conducting Interviews and Evaluating Bids



Retirement Form Preparation

- Form 5500 preparation and review
- Financial Statement Assistance



Retirement Plan Design

- Plan Design Analyses, Including Cost Modeling
- Compliance Testing Modeling and Projections
- Amendment Drafting and Review



Transaction Advisory Services

- Benefits Compliance Due Diligence
- Post-transaction Integration
- Plan Mergers and Terminations



DOL and IRS Correction Program Assistance

- Audit Coordination and Response
- VFCP and VCP Filing Preparation and Submission
- Process Documentation and Process Review

Our Goal

Our compensation and benefits professionals are highly qualified to assist with the design of new compensation and benefit plans, evaluate and enhance existing plans, and ensure your organization's compliance with the various tax and ERISA laws and regulations. We aim to maximize business effectiveness and cost efficiency while at the same time minimizing your organization's tax, financial, and regulatory burdens.

For More Information:



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ABOUT ALVAREZ & MARSAL

Founded in 1983, Alvarez & Marsal is a leading global professional services firm. Renowned for its leadership, action, and results, Alvarez & Marsal provides advisory, business performance improvement, and turnaround management services, delivering practical solutions to address clients' unique challenges. With a worldwide network of experienced operators, world-class consultants, former regulators, and industry authorities, Alvarez & Marsal helps corporates, boards, private equity firms, law firms, and government agencies drive transformation, mitigate risk, and unlock value at every stage of growth.

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