

Hunter Benefits Consulting Group

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Owner Only Defined Benefit Fee Schedule

Document	\$750.00	The document package includes a standard prototype adoption agreement and document, the SPD, benefit enrollment forms, benefit distribution forms. IRS user fee, if any, will be extra. Volume submitter rates upon request.
	
Set-up New Plan	\$250.00	
 OR	
Take Over Existing Plan	\$950.00 base	Fee assumes employer is able to provide complete and accurate employee account information as of the end of the prior plan year. Missing or inaccurate information will result in extra hourly charges.
	
On Going Administration	\$1,000.00 base	<ul style="list-style-type: none">• Actuarial valuation includes cost and benefit calculations• Trust Reconciliation• Advance contributions calculation• Determining and tracking eligibility, vesting and 415 limits• Top Heavy status determination• Annual employer and employee reports• Signature ready Form 5500 and all applicable attachments
Schedule B	\$175.00	
AFTAP Calculation	\$75.00	These fees are passed through from our actuary without markup and are subject to change without notice.
Benefit Distribution	\$250.00 per distribution	Presumes fund holder issues 1099R
All other projects	\$150.00 per hour	Other projects would include research, general consulting, funding and contribution formula consulting and correcting employer errors