

Hunter Benefits Consulting Group

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Defined Benefit Fee Schedule

Document	\$950.00 The document package includes a non-standard prototype adoption agreement and document, the SPD, benefit enrollment forms, benefit distribution forms. IRS user fee, if any, is extra. Volume submitter rates upon request
Set-up New Plan	\$350.00 base plus \$35.00 per eligible participant OR
Take Over Existing Plan	\$1,000.00 base plus \$35.00 per eligible participant 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 billed at \$150 per hour.
On Going Administration	\$1,400.00 base plus \$35.00 per eligible participant <ul style="list-style-type: none">• Actuarial valuation includes cost and benefit calculations• Trust Reconciliation• Advance contributions calculation• Tracking eligibility, vesting and 415 limits• Top Heavy status determination• Annual employer and employee reports• Annual minimum of \$2,000 applies
Form 5500	\$425.00 with less than 100 participants Plan Sponsor receives signature ready Form 5500 and all applicable attachments.
Schedule B AFTAP Calculation	\$175.00 \$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 (not including 1099R)
All other projects	\$150.00 per hour Other projects would include research, general consulting, funding and contribution formula consulting and correcting employer errors