

Custom solutions, expert support, maximum savings



# Paired Cash Balance/401(k) Plan Solution

Maximize retirement savings and give your team a competitive edge with Milliman's paired cash balance/401(k) plan. Backed by over 75 years of actuarial consulting excellence and award-winning defined contribution administration services, our tailored solution allows partners and owners to take advantage of higher retirement benefits while providing your staff with a competitive 401(k) plan.

## Why Consider a Cash Balance/401(k) Plan?



### ACCELERATED SAVINGS

Fast-track savings beyond defined contribution plan limits.



### COMPETITIVE EDGE

Attract and retain top talent as an employer of choice with a paired plan solution.



### EXPERT SUPPORT

Our deep expertise across DC and DB from a plan design, compliance, and governance standpoint, helps employers thrive.



### CUSTOM SOLUTIONS

Our solutions are tailored to your business's unique needs, from plan design to ongoing services to benefit distribution.

## Comprehensive Services

**Actuarial:** Annual actuarial funding report, AFTAP certification, Form 5500 including Schedule SB, annual funding notice, discussion of valuation results, annual benefit statements, cash balance plan document preparation.

**Compliance:** Participant vesting review and statements, calculation or review of additional employer contributions, completion of nondiscrimination or compliance testing, annual governmental forms (Form 5500 and Form 8955-SSA), annual required notices, and defined contribution document preparation.

**Recordkeeping:** Full plan and participant level recordkeeping services.

**Additional consulting:** Plan design review, plan change analysis, plan mergers and terminations, discrimination testing issues, custom reporting, onsite meetings, audit responses, and communication projects.



To learn more, scan the QR code.

[milliman.com/en/products/Small-Business-Retirement-Plan-Solution](https://milliman.com/en/products/Small-Business-Retirement-Plan-Solution)

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Put the power of Milliman's independent thinking, custom solutions and expert consulting to work for you.