TPA Comparison Checklist				
Questions to ask your TPA		**Pension Consultants Co., Inc.**	**Current TPA**	**Other TPA**
1	Do you have one administrator I can contact to answer all my questions?	Yes		
2	Can I contact my administrator without going through a phone menu?	Yes		
3	Do you reconcile each participant's deposits with their payroll records?	Yes		
4	Do you track vesting and include on annual report to Trustee?	Yes		
5	Do you track ineligible employees and include on annual report to Trustee?	Yes		
6	Do you determine the Highly Compensated and Key employees?	Yes		
7	Do you assist in determining employee eligibility dates?	Yes		
8	Do you do perform all required compliance testing?	Yes		
9	Do you provide each participant with an annual statement of account activity and vesting?	Yes		
10	Do you provide the Trustee with a consolidated report of account activity by participant and plan totals?	Yes		
11	Do you prepare 5500's and obtain confirmation of filing status?	Yes		
12	Will you meet with us on request?	Yes		
13	If you answered yes to any or all of the above, are they included in your base fee?	Yes		
14	Do you invoice client only for work completed rather than quarterly in advance?	Yes		
15	Do you contact terminated participants to provide distribution paperwork?	Yes		
16	Do you respond to IRS/DOL inquiries regarding our plan?	Yes		
17	Do you sponsor an in house IRS-approved Plan Document?	Yes		
18	Do you provide references?	Yes		
19	Do you belong to professional pension organizations with credentialed members?	Yes		
20	Do you have a secure website to transfer confidential files?	Yes		