

# Your Pension Risk Transfer Team



Ash Brokerage delivers comprehensive pension risk transfer services to defined benefit plan sponsors. Our expertise covers all details of the complex process of terminating pension plans, making it a simple process for plan sponsor clients.



## Project Management

End-to-end management of the client's pension projects. For the duration of each project, we follow a detailed timeline and hold regular touch points to keep everyone informed of progress. This keeps the project on time with no missteps and allows the client to focus on their core business.



## Plan Analysis

Extensive consulting expertise and understandable analysis. We drill down to the information needed to make positive changes for the client's pension plan and business.



## Window Administration

We can save clients significant liability amounts and PBGC premiums. We handle all aspects of the administration of lump-sum windows, from the data clean-up to pension payments.



## Annuity Purchases

We show the client their true cost to transfer the pension liabilities. We market the pension plan to insurance companies, run the bid negotiation, provide the needed fiduciary information and manage the transfer process to the selected insurer.



## Termination

We specialize in plan terminations. We complete all government filings and work with both the PBGC and the IRS to get needed approvals. We provide onsite participant education and call center service so participants understand the benefits of the plan transfer. We compose and mail all participant communications. We also market the plan to insurance companies: competitive bid negotiations, provide fiduciary information and manage the final transfer process to the selected insurer.

## SUMMARY

Our expert knowledge and comprehensive processes set the industry standard. We help clients get off the funding roller coaster with a cost-effective PRT solution that meets their needs and places participant benefits in secure hands. Call Steve Pilger, National Sales Director of Pension Risk Transfer at (260) 450-8827 for more information.