



**DESIGNING
RETIREMENT PLANS
FOR COMPANIES**

Since 1998

CONTACT US

Advanced Plan Designs

3859 S. Cox

Springfield, MO 65807

Phone: 417-885-0181

Fax: 417-885-0198

Email: info@AdvancedPlanDesigns.com

AdvancedPlanDesigns.com

Susan L. Humbard, ERPA, QPA, APR MANAGING MEMBER



Susan L. Humbard founded Advanced Plan Designs in 2011 after selling her interest in another TPA firm she founded and owned since 1998. She has over 26 years of experience working with retirement plans. Susan meets with business owners and custom designs plans that meet their company objectives.

In the previous 20 years she has been primarily responsible for the firms' sales and marketing efforts, which entails calling on a variety of networks and developing relationships with investment advisors, banks, wire houses, investment companies, and independent broker-dealers. Susan graduated from Missouri State University with a Bachelor of Science in Accounting and frequently speaks at seminars and other events with business owners, accountants, attorneys, financial advisors & other business groups on advanced retirement plan topics and other related business topics.

ABOUT US

Advanced Plan Designs (APD) is an employee benefits consulting firm in business over 20 years **designing retirement plans for companies large and small across the United States.** We are focused on delivering custom plan design and on-going administration for qualified retirement plans.

Our plans are tailor-made to accomplish your goals. While the right plan design will save you thousands of dollars each year, the wrong plan design can cost even more. It is our belief that your role is to run your business and our role is to run your retirement plan. In that role, we are constantly working to assure that all rules are being complied with, all legislative requirements are being met, the plan document is being followed and the plan is being maintained in operational compliance.

Our team will assist you from implementation to termination of your qualified plan. By offering plan administration and custom document design as our **ONLY** services, we are able to sharply focus our talents and attention on the details of managing your plan. Using our firm creates a simple but effective "check and balance" system. This offers you a greater degree of protection and oversight. **Let our "experience" work for you.**

OUR SERVICES



Plan Design & Document Consultation

- Conduct initial plan analysis and design review
- Draft plan documents, amendments, and plan restatements as required by law
- Create signature-ready documents
- Prepare all required participant disclosure notices
- Plan Types Offered: 401(k) Plan, Safe Harbor 401(k), 403(b), Cash Balance, Profit Sharing, Money Purchase, Solo 401(k), Owner Only Cash Balance



Government Reporting

- Prepare IRS Form 5500 Annual Return/ Report for e-filing
- Draft Summary Annual Report
- Prepare Form 5330 (if necessary)
- Prepare Form 5558 (if necessary)
- Prepare Form 8955-SSA (if necessary)



Compliance Testing

- Complete all required calculations
- Complete all required compliance tests such as ADP/ACP, top heavy, 402(g), 415 and 410(b) tests
- VCP (Voluntary Correction Program) /EPCRS filings



3(16) Fiduciary Services

- Serve as agent for legal process (co-fiduciary)
- Review and authorize participant loans/distributions
- Integrate with existing payroll provider to provide 360 payroll services
- Manage Automatic enrollment process



Additional Services

- Provide enrollment meeting support
- Train HR staff on plan-related matters
- IRS/DOL audit assistance
- Simple IRA consulting

WHY CHOOSE US?

EXPERTISE

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REAL SOLUTIONS

Many providers offer retirement plans, but Advanced Plan Designs offers “real solutions”. Our team will custom design a plan that meets **your** objectives. Each plan is tailor made to accomplish the goals you have established. We offer free proposals. While the right plan design will **save** you thousands of dollars each year, the wrong plan design can **cost** you even more. We offer the real solutions you have been looking for.

OUR PREFERRED VENDORS



Hear what our clients have to say...

"This company is awesome. Experts in the field, and they took care of us. Anything they could do, they did. We did very little on our end and provided a valuable benefit to our employees in compliance with all regulations, disclosures, and filings."

Kirk Bossert

CFO & Board Member, SFC Bank



"Advanced Plan Designs has served as our 401(k) plan administrator for 11 years. The staff at APD have always been friendly and professional, and we have great confidence knowing our plan is not only compliant but also customized to best suit our company's needs."

Mickey Moore

CEO, TOMO Drug Testing





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