



The Nation's Premier Fiduciary Retirement Platform™

A State-of-the-Art Platform for the full spectrum of Retirement Plans

PCS pioneered the open architecture approach to providing a comprehensive retirement plan. Now, we're revolutionizing the technology behind it.

Real testimonials from real clients:

“ This is great! PCS is one of the only recordkeepers who is doing this for their clients ... You made it easy.

TPA, AL

We are very appreciative of your work ... The other providers we work with either placed the onus entirely on our client or only covered their own fees – you did it all! These disclosures are the best we have seen so far. Thank you to everyone who has been involved.

Advisor, NJ

”

Learn why the future of Recordkeeping is already here.

There's a reason PCS was ranked as one of the fastest growing companies in America by Inc. 5000. Beyond our unwavering commitment to excellent customer service, we are also driven to offer the most advanced platform in the industry. Our AccountLink System incorporates robust technology that makes your job easier, like streamlined payroll processing, detailed plan and participant views, 3rd party software integration, automated funding requests, and on-demand reporting. Its all a part of our commitment to our clients, and the promise of delivering The Next Generation Retirement Plan™.

Plan Types

PCS offers an array of plan types and arrangements. They include:

- 401(k) Plans
- 403(b) Plans
- 457(b) & (f) Plans
- Profit Sharing Arrangements
- Non-Qualified Retirement Plans
- IRA Plans
- Solo(k) Plans
- And more



PCS was rated one of America's fastest growing companies by Inc. 5000
© Professional Capital Services, LLC | www.PCS401k.com | 1-877-272-401k



Our **cutting-edge technology** allows clients to spend less time administering the plan, and more time managing their business.

At PCS, you get more than excellent customer service. You're given access to an abundance of tools and functionality that makes maintaining and monitoring a retirement plan easy. We pride ourselves on leveraging technology to constantly improve and perfect the way a plan is managed.

State-of-the-Art Daily Valuation

PCS offers comprehensive up-to-date information on asset values and an array of advanced platform features. Daily Valuation features include:

- Daily Valuation of Participant Accounts by Source & Fund
- Online Distributions and Paperless Loan Capabilities
- Daily Processing & Reconciliation of Account Activity
- Calculation of Minimum Required Distributions
- Real-Time Vesting Service Computation

Streamlined Payroll Submission







Our PaySnap system integrates with many third-party payroll providers, such as ADP, Ceridian, and Paylocity.

Automated Funding Request (AFR)

Our automated funding request process:

- Prevents Issues Before They Happen
- Confirms Data Receipt
- Validates Data
- Indicates Total Funding for ACH
- Helps manage future contributions/loans

Advanced Enrollment and Fiduciary Tools are Built-In!

-  Annual Plan Review and Fee Benchmarking Report
-  Evergreen Enrollment Materials (including dynamically updating required fiduciary notifications)
-  Eligibility Alert System to help track and be notified of employee enrollment dates
-  (k)nowledge, a financial wellness platform, offering 12 distinct educational modules on-line
-  Annual Plan Fiduciary All-In-One Fee Report (ERISA 408(b)(2) compliant)
-  Preparation and delivery of all required notices including the participant fee disclosure, QDIA, and RMD

PCS is CEFEX certified as adhering to ASPPA's Standard of Practice for Retirement Plan Service Providers. Roland|Criss has also awarded PCS with a "AAA" rating for its Superior Quality Management System.