

10 REASONS TO CHOOSE KRAVITZ BACK OFFICE SOLUTIONS

You have many choices when it comes to partnering with an actuary. We want to make it easier, delivering not just actuarial excellence but ultimate peace of mind for you and your clients. Our goal is not to *win* your business, it's to *build* your business.

Kravitz Back Office Solutions is different, and here's why:

- 1 We help you sell and succeed:** From high-impact plan designs to customizable marketing materials and conference call support, we can help you through each step of the sales process.
- 2 Free, fast, crystal-clear plan designs:** You'll receive a customized plan design within 3 business days after sending us basic census data. Plus a debrief call to discuss options and answer your questions.
- 3 Seamless services with a human touch:** Our friendly, dedicated team offers live help and technical support during *your* business hours.
- 4 You control your profitability:** Our cost-effective fee structure and multiple service levels allow you to set your own profitability goals and margins.
- 5 All-inclusive fees:** Annual administration includes a signature-ready Form 5500 with all schedules, combo testing and profit-sharing calculations, actuarial report, AFTAP certification, PBGC premium filing and more. Visit our website for a complete list of services – you'll be happily surprised.
- 6 Technical excellence and timeliness guaranteed:** Backed by Kravitz, with more than 25 years of Cash Balance expertise and national leadership.
- 7 Private labeling – you own the client relationship:** We never contact your clients directly, and you can custom-brand our product and our online portal. Or you can leverage the Kravitz brand – it's your choice.
- 8 Online participant portal and daily recordkeeping:** Your clients will enjoy instant online access to their accounts from any computer or mobile device. Brand the portal with your logo or theirs.
- 9 Education and training to empower your team:** We share the Kravitz Cash Balance brain trust with our TPA partners, offering training on all aspects of plan administration, investments and sales.
- 10 Proven record of success:** More than 150 TPA firms across the country are already succeeding and growing with Kravitz Back Office Solutions. Visit our website to read testimonials.

Ready to get started? Go to KravitzBackOffice.com and create your free TPA account in 30 seconds, and get your first free plan design tomorrow.

KravitzBackOffice.com | (877) CB-Plans

Expand your plans. Expand your business.

KRAVITZ

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