



UNCOMPROMISING SERVICE AND SUPPORT FOR TPAS

ADP retirement plans offer unbundled solutions, giving your clients the flexibility to best meet their retirement plan needs — including the ability to leverage the expertise of their preferred third party administrator (TPA). With hundreds of partners and growing, our TPA programs support you every step of the way, so you can do what you do best.

Working together

With your expertise and ADP's advanced services and technology, we can together deliver outstanding retirement plan benefits to plans sponsors. Our comprehensive support and flexibility to choose plan features makes it easier for you to meet your clients' unique needs and fulfill your responsibilities.

With ADP, you're an essential part of the successful plan implementation process — we include you on the welcome call, discuss plan design and provide you with the plan's go-live communications. Thanks to our seamless data connections, you can be confident that your plans are accurate, secure and compliant.



**Real-time integration,
regardless of payroll
provider, makes plan
administration and
compliance easy
and accurate.**

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SERVICE	ADP	TPA
Plan setup and implementation on the ADP recordkeeping system	■	
Withdrawal, distribution and RMD processing, including forms 1099-R and tax withholding	■	
Plan trustee services (optional)	■	
Notice and plan disclosure delivery (if elected)	■	
Summary Annual Report and Form 5500 notice		■
Annual compliance testing		■
Annual 5500 form and schedule filing		■
Annual contribution calculation, including New Comparability, Profit Sharing and Cash Balance		■
Access to client audit package (Prepared by ADP for clients filing a Schedule H)		■
Consultative plan design and customization using the ADP Prototype Plan adoption agreement and amendments	■	■
Client and participant service and support	■	■
Monitor eligibility and vesting	■	■
Loan administration	■	■

ADP is committed to making retirement plans easy and engaging so you can meet your clients' needs. For more information about our solutions, visit ADP.com or contact ADP Retirement Services at 844.237.3548, option 2.

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Why ADP?



Seamless connections and smart data automation helps to mitigate plan risk



Flexible compensation structure and automated payment options (invoicing as well as percentage and hard dollar calculations)



ADP TPA portal lets you easily manage your ADP plans, complete compliance tasks and access customized TPA reporting



Dedicated TPA service team and regional sales distribution team provides support

