ERISA Services, Inc.
Helping You Become Retirement Ready

Service Provider Relationships

EMPLOYER

Other Key Roles:
-Payroll Vendor
-Attorney
-Auditor

CPA

FINANCIAL ADVISOR

RECORD-KEEPING PLATFORM

ERISA Services, Inc.
Helping You Become Retirement Ready

-Consult on Plan Design
-Provide Plan Documents
-Form 5500

TPA
THIRD PARTY ADMINISTRATOR

-Provide Plan Administrative Support
-Annual Compliance Work