Full-Service Support for Your Retirement Plan

Streamlined administration. A comprehensive recordkeeping solution. More efficient operations. And the flexibility to design a program that works for your company.

With Newport retirement services, you can rely on a national independent provider for comprehensive, state-of-the-art services: leading-edge technology, easy-to-read participant statements, and fully integrated systems. But our plan administration is more than high-tech. Our ability to address your company's unique needs makes it high-touch as well.

Our Team, Ready to Help

Every aspect of your plan is overseen by one client service professional, who serves as a single point of contact for managing your plan's transition and administration from start to finish. Behind your individual contact stands the Newport client service team—compliance, communications, conversions, and technology professionals who can meet all of your administrative needs.

Newport Recordkeeping and Administration Solutions

Recordkeeping

- Daily valuation of accounts
- Process contributions and distributions
- Eligibility and enrollment processes
- Fund changes/additions
- Electronic processing of payroll data

Regulating Compliance Testing

- All regulatory compliance testing
- Government tax reporting
- Auditor packages

Reporting

- Consolidated reporting across plans
- Company reports quarterly
- Distribution statements
- Government reporting provided by paying agent

Distributions and Loans

- Hardship, in-service, and lump-sum distributions
- Participant loans, loan documents and administration
- Loan repayment by payroll deduction
- Roth conversions

Notices and Reporting

- Prepare diagnostic of current plan provisions
- Plan document and amendment consulting
- Prepare required plan notices
- Dedicated assistance with plan corrections and filings for past events

Participant Services

- Targeted education campaigns
- Online enrollment
- Customizable on-demand statements
- Easy to use website
- Toll-free Participant Service Centers

Trust Services

- Check, wire, and ACH disbursements
- Revenue sharing collection and reporting
- Consolidated reporting and financial statements

Conversion

- Total conversion management
- Consultative approach
- Establish plan and participant level account(s)
- Reconcile plan assets to participant balances

FIND OUT MORE

Let us make your retirement plan recordkeeping and administration easier and more effective. To learn more about contact your Newport Representative.

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