

# Get to Know the Partners of Open Choice Retirement



## Third Party Administrator / Recordkeeper

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Flexible Benefits Systems, Inc. (FBSI) was founded in 1993 to provide third party administrative services to qualified retirement plans. FBSI is a team of knowledgeable, experienced professionals working to develop strong, long-term relationships through special attention to client needs. Our outsourced services provide a seamless integration of trustee, custodian, investment management, daily recordkeeping, participant and sponsor education, and internet access.

### Flexibility in Level of Service

Recognizing the importance of our client's relationships with their trusted advisors, clients can determine the level of service they desire from FBSI.

- Daily Valuation
- Plan Design & Document
- Balance Forward
- Compliance Only
- Form 5500 Preparation
- Flexible Spending Accounts

### Flexibility of Plan Design

FBSI administers the following plan types and design features:

- 401(k) Safe Harbor & Roth
- Cross Tested
- Cash Balance
- Integrated / Age Weighted
- Profit Sharing only
- Solo 401(k) Plans
- Other defined benefit, non-qualified deferred compensation

### Flexibility in Fee Arrangements

FBSI provides full disclosure of all fees and revenues associated with retirement plans. Plan expenses may be paid from the assets of the plan, by the plan sponsor, by revenues earned from the mutual funds, or a combination of these options.

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