



Club Retirement Plan

The Premier 401k ClubSolutionSM

Employee Retirement (401K) Plan

Advantages of Adopting the CMAA Club Retirement Plan

Fiduciary Support

3(38) Investment Manager

Case Pearlman Retirement Plan Advisors

- Completes the selection and monitoring of investment portfolio in accordance with the Investment Policy Statement (IPS)
- Monitors fees to ensure they are reasonable
- Includes an ERISA attorney as part of the compliance team

Administrative - 3(16) Plan Administrator

- Provides employee notices, eligibility tracking and distribution management
- Interprets and enforces plan document
- Ensures IRS and Department of Labor compliance

Potential Cost Savings

- No annual audit requirement or fee
- Form 5500 filing is transferred to the Multiple Employer Plan (MEP)

- Complete open architecture
- No costs associated with plan document maintenance, restatement or amendment responsibilities

Flexibility in Plan Design

- Clubs are able to maintain unique plan design features such as: vesting schedule; type and amount of employer match; Roth option; plan loan availability; and hardship
- The Club Retirement Plan is designed specifically for all CMAA member clubs

Prices:

CMAA Member: \$500

*Note: You must be a CMAA member to participate.

Contact:

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Simplify Your Club Retirement Program today.

E-mail CMAA401k@cmaa.org.