DIRECTED TRUSTEE SERVICES

Qualified Trust Company

Who Are We?

Qualified Trust Company (QTC) is licensed to serve as a Fiduciary incorporated under the State of Arizona. QTC is able to serve as Directed Trustee of ERISA qualified retirement plans.

What Do We Do?

As directed Trustee, QTC is able to take direction from another plan fiduciary to take administrative actions for the plan. QTC is limited in the actions it can take to actions that are in accordance with the terms of the plan and not contrary to ERISA.

Our Services

Responsibilities

Once appointed, QTC will act solely in the best interest of plan participants. We also serve as agent for service of process for the plan.

Timely Reporting

QTC will issue a consolidated statement of trust assets at least annually. As directed trustee for a PEP, we also monitor the accuracy of contributions and the timeliness of their deposit to the plan.

Safeguard Plan Assets

The use of an outside corporate trustee like QTC adds an additional layer of independent fiduciary oversight for the Plan Administrator.

GET IN TOUCH

Phone: 480-629-5830
Fax: 832-252-9650

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14500 N Northsight Blvd, Suite 205
Scottsdale, Arizona 85260

Why QTC?

Plans that Benefit from Directed Trustee Model

- Foreign-owned companies
- Companies with many owners or shareholders
- Companies with high turnover, especially in executive ranks
- Larger companies with more formal corporate governance processes
- Pooled Employer Plans (PEPs)
- Plans under a 402a Named Fiduciary model

What does it cost?

Annual fee

The cost of QTC Directed Trustee services are $500 annually per plan. Please refer to the QTC service agreement for full terms and conditions.

Limits to Services

- QTC shall not serve as a Discretionary Trustee.
- QTC is not a 402a Named Fiduciary of a plan
- QTC does not provide investment advisory 3(21) or investment management 3(38) fiduciary services

Ready to get started?

Contact your QTC representative today to learn more about our offerings
+ 480-629-5830

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