



ERISA
RISK MANAGEMENT

Plan Termination Services

Our Dedication to ERISA



We are dedicated to maintaining unwavering ERISA compliance in everything we do

CLIENT TESTIMONIALS:



"ERISA Risk Management made our plan termination seamless. They worked directly with our legal counsel and coordinated flawlessly with all of our plan providers. We couldn't have asked for a more knowledgeable or reliable partner."

— **Robert G** , CEO OEM Parts Manufacturing Company

OUR MAIN SERVICES:



12 Point Auditable Process

A 12-point auditable process ensures every retirement plan termination is executed with complete transparency, full documentation, and strict adherence to IRS and DOL regulations.



Full Integrated with SMART IRA Plan Solutions

Our plan termination service is fully integrated with SMART IRA Plan Solutions, allowing participant accounts to transition smoothly and efficiently. This integration streamlines distributions, reduces administrative involvement from the plan sponsor, and ensures participants receive clear guidance throughout the process.



Plan Termination Report

The final Plan Termination Report provides a complete, audit ready record of the entire process, documenting every required action from participant notices and vesting verification to distributions, compliance testing, and the final Form