IS EASY TO ADMINISTER

Transamerica Museum Retirement Program performs 99% of the administrative duties required for a company to offer a Retirement Plan to their employees. This removes the administrative burden from company employees and executives so you can focus on what’s most important — running your business.

IS COST COMPETITIVE

Transamerica Museum Retirement Program, powered by TAG Retirement Solution, is built on an "aggregated" model - your company gains the advantages of economies of scale in pricing.

MINIMIZES FIDUCIARY LIABILITY

Transamerica Museum Retirement Program allows a company to shift its fiduciary duties to the greatest extent permitted by law providing a company fiduciary support to mitigate defined legal obligations and responsibilities. This commitment provides for peace-of-mind that your fiduciary obligations are being met.

TEAMS WITH WELL KNOWN PROVIDERS

The Transamerica Museum Retirement Program combines 3(16), 3(38), and TPA services for "end to end" retirement plan oversight. TAG Resources, as the 3(16) and TPA, teams with the plan’s Recordkeeper, Transamerica, which reports $248 billion* in assets serviced, and with handpicked ERISA 3(38) Investment Managers.

IS COMPLIANT

As of the 2015 Department of Labor random audit period, the DOL reports more than 67% of retirement plans failed their audit.** However, plans administered as directed by TAG Resources have never failed an audit. TAG is your Retirement Plan Support Team, signs the Form 5500, and ensures each plan is consistently in compliance with the DOL and IRS regulations. If you are out of compliance, TAG is out of compliance - and that has not happened in TAG’s 15+ years of operation.


You don’t want to be Retirement experts.

You don’t want to overpay.

You don’t want to be at risk.

You want to work with the best.

You don’t want fines or penalties.

TAG PROVIDES UNPARALLELED VALUE BY OVERACHIEVING ACROSS THE BOARD.

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The bottom line is that, for every plan, TAG acts as the company’s retirement plan support team, so the company doesn’t have to act as a retirement expert. TAG acts as a buffer between the Plan Sponsor and the DOL and IRS, and works to keep each plan in compliance with all applicable laws. TAG’s experts make the decisions and take responsibility for those decisions with respect to the services they provide, taking away one more thing that might keep Plan Sponsors awake at night. TAG does all of this at a price comparable to plans that offer fewer services.

Plan Sponsor Responsibilities without Transamerica Museum Retirement Program

- 3(38) Investment Manager Appointment
- 402(g) Limit Reporting
- 404(a)(5) Notice Distribution
- 404(c) Notice Distribution
- 408(b)(2) Notice Distribution
- Annual Discrimination & Coverage Testing
- Annual Fee Negotiations With Vendors
- Audit Completion Support
- Audit Firm Hiring & Monitoring
- Auto Enrollment Notice Distribution
- Beneficiary Designation Form Maintenance
- Beneficiary Determinations
- Blackout Notice Distribution
- Census Review
- Corrective Distributions
- Death Benefit Approval
- Distribution Reporting
- DOL and IRS Issue Resolution Assistance
- Eligibility Calculations
- Eligibility Notifications
- Employer Contribution Monitoring
- ERISA Bond Review
- Error Correction Monitoring
- Fiduciary Insurance Coverage Review
- Force Out Processing
- Form 5330 Preparation
- Form 5500 Preparation, Signing, & Filing
- Form 8955 Preparation, Signing, & Filing
- Fund Change Notice Distribution
- Hardship Withdrawal Approval
- Loan Approval & Reporting
- Loan Default Monitoring
- Loan Policy Administration
- Lost Earnings Calculations
- Participant Enrollment Assistance
- Payroll Aggregation
- Payroll File Distribution
- Plan Design Review
- Plan Document Interpretation
- Plan Document Preparation & Archiving
- Plan Irregularity Notification
- QDIA Notice Distribution
- QDRO Determinations & Reporting
- Quarterly Investment Review Meetings
- Rate Change Monitoring & Reporting
- Required Minimum Distributions
- Safe Harbor Notice Distribution
- SAR Production & Distribution
- SMM Notice Distribution
- SPD Production & Distribution
- Spousal Consent Approvals
- Termination Date Verification & Maintenance
- Termination Withdrawal Approval
- Trustee Duties
- Upload Payroll Files
- Vesting Verification & Tracking
- Year End Data Collection & Review

* Required, but may be provided by payroll company

Plan Sponsor Responsibilities WITH Transamerica Museum Retirement Program

- Monitor TAG
- Upload Payroll Files
- Year End Data Collection

Transamerica Museum Retirement Program PERFORMS 99% of administrative tasks by becoming your retirement department support team

How can I learn more or get started?
If you would like more information about the Transamerica Museum Retirement Program, please contact us at:

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Museum Ret Program Features & Responsibilities 05102019 MW

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