

Defined Benefit Plan

Solutions and Services

A Defined Benefit (DB) pension plan may make a lot of sense for your business, especially as we move to an era of aging workers and a tight labor market. If you already have a DB plan, you know that the administrative and regulatory requirements can be considerable. TRI-AD has the expertise to help you design and administer a plan that will succeed today and for the years to come.



Discover Plan Designs that Work for You

TRI-AD is *the* provider of choice for businesses with complex retirement needs. Our flexible, creative team works with you to develop a plan that addresses your business needs, meets your funding objectives, and maximizes tax savings.

Leading-edge employers reward the “right” people appropriately without driving costs through the roof.

TRI-AD is intimately familiar with the entire array of available qualified retirement options and will help design the right solution for you.

Once you have the right design, we deliver a participant experience that delights your employees and greatly enhances their appreciation of your plan.

With TRI-AD, you can expect retirement plan solutions that work.



Avoid Compliance Headaches

Plan compliance is like the plumbing in your house: you don't even think about it until something goes wrong and you can have a disaster

on your hands. With over 35 years of compliance experience, we anticipate and solve problems before they occur. *TRI-AD is unmatched at helping you protect your plan's qualified status.*

Have Your Retirement Plan Administered Effectively

We have proven repeatedly that we deliver high-quality service and participant care more cost-effectively than the large retirement consulting firms.

If you prefer, you can unbundle the actuarial and administrative work and have TRI-AD handle just the administration. We administer both active and frozen Defined Benefit plans, working with your actuary as needed.

With our administration and compliance expertise, the details “just happen” from your perspective.

The Right Provider Makes the Difference

Experience 97% Client Satisfaction.
Here's what our retirement plan clients have to say:

“TRI-AD has been reliable and extremely helpful in guiding us in providing a comprehensive benefits package in a competitive market. They have been involved from plan design through implementation to ongoing employee service. TRI-AD has consistently supported us in a manner that is both cost-effective and comprehensive. In working with TRI-AD for more than 15 years, I recommend them to many other colleagues and business owners.”

- Founding Partner,
Dermatology Medical Group
in San Diego County



Discover the TRI-AD Difference

From planning through implementation, TRI-AD works with you to develop practical retirement plan solutions that yield positive results. We guide you through the regulatory and financial maze while delivering the best in consulting and administrative services.

Expert Consulting Services

Our team of actuaries and consultants uses a proven process to help you succeed:

Strategic Planning

We guide you through the process of developing short- and long-term retirement benefit strategies.

Financial Analysis

Drawing on our extensive consulting and administrative expertise, we perform feasibility studies and analyze plan costs.

Custom-Fit Benefit Design

Whether your DB plan is new or you need to make changes, we evaluate alternatives and assist you in selecting the option that best meets your objectives.

Project Management

We establish timelines and coordinate resources to perform tasks and complete projects effectively.

Ongoing Plan Management

Once your retirement program has been established, TRI-AD will continue to monitor your plan's success against your stated objectives.

Accurate Administrative Services

TRI-AD's comprehensive administrative services combine technical accuracy with efficiency. Your staff is relieved of reporting and compliance burdens, giving you both peace of mind and internal administrative savings.

Plan Documentation and Filing

TRI-AD assists you with plan documentation requirements and assures that you comply with federal regulations. We keep your plan document updated for legislative changes.

Actuarial Services

Our actuarial team will calculate your plan's contribution requirements.



General Plan Administration

Our team of professionals will:

- Guide you in developing administrative policies and procedures
- Develop periodic participant and management reports
- Maintain a database of all relevant historical data
- Evaluate the effects of changing legislation and regulations on administration
- File all required federal filings
- Provide payout calculations
- Answer participant inquiries
- Provide requested benefit projections and modeling

Compliance Testing

Plan compliance testing is difficult and frustrating. We run the tests properly, then help you solve any testing challenges you might be facing.

Your Complete Benefits Outsourcing Solution

For over 35 years, TRI-AD has been trusted and relied upon by mid- to large-size companies nationwide for expertise in benefits design and administration solutions. Streamline your labor-intensive administrative work by using one service provider for all your benefits administration needs. TRI-AD's service offerings include:

- Online Benefit Enrollment, Carrier Feeds and Premium Billing Management
- Reimbursement Plan Administration (FSA, HSA, HRA, Wellness, Tuition, Commuter, etc.)
- Comprehensive COBRA Administration
- Retiree Billing and Premium Collection
- Retiree Health Reimbursement Plan Administration
- Leave of Absence Billing and Premium Collection
- 401(k) and 403(b) Recordkeeping
- Defined Benefit Plan Administration
- Nonqualified Deferred Compensation Plan Recordkeeping and Administration
- SnapIRA™



The single-source provider for all your benefits administration needs