



Benefit Plan Consulting Fact Sheet

About BKD

BKD, LLP, one of the largest CPA firms in the U.S., provides expertise in consulting, tax, assurance and accounting outsourcing solutions to businesses, governmental entities, not-for-profit organizations and individuals. Our clients experience practical advice, ethical solutions and results with integrity.

BKD Wealth Advisors, LLC is an investment advisory firm registered with the U.S. Securities and Exchange Commission and provides personal wealth planning, investment management and estate planning solutions.



credentialed
advisors
25+

*With more than 25 credentialed advisors, you'll have access to industry expertise and **experience personal communication.***

BKD Wealth Advisors, LLC's Benefit Plan Consulting (BPC) division provides integrated design, implementation, compliance testing and investment management services to retirement plan sponsors. Our goal is to use our expertise to deliver practical, timely and affordable services. We offer assistance to more than 600 plans, including third-party administrative consulting, investment consulting and employee stock ownership plan administration.

Our Mission

Through all of the BPC services we provide, whether one-time or ongoing, our goal is to help plan fiduciaries:

- Fulfill their fiduciary responsibilities
- Implement industry best practices
- Provide plans that give employees an opportunity to create successful retirement outcomes

Plan Types

Our professionals provide services for a variety of plan types, including:

- 401(k)
- 403(b)
- Cross-Tested
- Defined Benefit
- Health & Welfare
- Money Purchase Pension
- Profit-Sharing
- Public/Governmental
- Employee Stock Ownership Plans

Offices

- Kansas City
- St. Louis
- Springfield
- Little Rock
- Indianapolis
- Wichita

Questions You Should Ask

- Is my plan designed and managed to achieve successful outcomes and provide meaningful retirement benefits for participants?
- As a fiduciary, am I aware I have personal liability for the decisions I make about the plan?
- Do I know my fiduciary responsibilities under ERISA?
- Am I comfortable with being considered a "prudent expert" in overseeing my duties as fiduciary? If not, have I hired an expert to guide me or to take responsibility for decisions?
- Have I been prudent in my decision-making process? Can I prove this through documentation?
- Does my third-party administrator (TPA) or investment advisor keep me informed of changes in ERISA and tax laws?
- Does my TPA review and analyze my data or simply process it?
- Do I clearly understand which types of service providers work with my plan and their roles?
- Am I aware of any conflicts of interest my service provider may have and how these may affect their objectivity?

Our Value-Added Services

An **integrated, consultative and disciplined approach** that addresses relevant aspects of successful benefit plan design and implementation, allowing us to customize our clients' plans

A **team with significant and relevant expertise**, including consultants with the following designations: Certified Pension Consultant, Accredited Investment Fiduciary, Qualified 401(k) Administrator, Certified Public Accountant, Qualified Pension Administrator, Professional Plan Consultant™, Chartered Financial Analyst®, Certified Investment Management Analyst and CERTIFIED FINANCIAL PLANNER™

Fiduciary responsibility awareness and compliance education for plan sponsors to help strengthen their ability to meet their fiduciary obligations

Regular, comprehensive and timely education for plan participants, provided to groups and one-on-one

A proprietary mutual fund screening process designed to offer **high-quality, objective and actively monitored investment options**

A fee-based model that provides **fee transparency, cost containment and objective recommendations**

Contact

For more information, contact your BKD advisor or:

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