



## News

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## PenServ Plan Services, Inc. IRS Approved 403b Document Packages Tailored for Employers

**HORSHAM, PA – April 14, 2017** – Though all 403(b) mass submitters recently received their IRS approval letters dated March 31st, not all were able to submit documents that had been tailored to the specific needs of each type of 403(b) employer plan sponsor.

PenServ Plan Services, Inc. has received their IRS approval letters (“Advisory Letters”) for multiple 403(b) Volume Submitter Plan documents. PenServ’s document packages have been designed specifically for the three types of 403(b) employers: public schools (including charter schools and ORPs), Non-ERISA and ERISA non-profit employers (including religious organizations that cannot have a 403(b)(9) plan), and churches with 403(b)(9) plans. Each package contains a plan document, adoption agreement, and the newly required administrative appendix.

“Our financial institution clients told us that they didn’t want or need one mega-plan document that they would have to adapt to their own needs,” said Susan D. Diehl, QPA, CPC, ERPA, president of PenServ, “so we gave them what they asked for. It was more costly to us, but I think we’re unique in offering documents drafted particularly for a specific type of employer. It makes compliance and the restatement process much easier for them.”

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**PenServ Plan Services, Inc.** is a national retirement plan consulting firm headquartered in Pennsylvania, with an independent third-party administrator division located in Columbia, South Carolina. PenServ has more than 30 years of experience in providing plan design, IRS approved plan documents, training, recordkeeping and administrative services for qualified retirement plans. In addition, PenServ maintains a knowledge base of state regulations to ensure compliance for governmental 403(b), 457(b) and 401(a) plans.