

# EMPLOYER SERVICES THAT MAKE LIFE EASIER



## **MAKE THINGS EASIER. PARTNER WITH US.**

Let us show you how we boost efficiency for clients and partners and make your life easy. By easy, we mean focusing on your needs, working with your preferred partners and vendors, and offering our best-in-class services in one seamlessly integrated package or a la carte. You can trust us to manage your retirement plan, payroll, 3(16) plan administration, employee benefits, and more. It's all about what fits your needs.

EXPERIENCE THE  
***GOLD STANDARD***®



# REDEFINING EASY

## EXPERIENCE A SIMPLER LIFE

Whether you're a business owner or financial advisor, you have enough to worry about, enough people to contact, and enough bills to pay. Let us join your team and ease those burdens so you can focus on growing your business. Integrate your retirement, payroll, 3(16) fiduciary services, and benefits with Goldleaf Partners. We'll make sure the ball doesn't drop, manage all the irons in the fire, and keep your ducks in a row. A simpler worklife is possible with Goldleaf Partners.

### THE GOLD STANDARD®:



“The Gold Standard is all about our clients and being their best partner. It's about bringing solutions and working side-by-side to solve their problems. It's about making their lives easier every chance we get and being their trusted advisor. It's about being on their team, all the time. In addition, as part of FuturePlan by Ascensus, clients and partners can continue to expect the same great service backed by even more resources to meet your needs.

**Michael E. King**  
Founder of Goldleaf Partners

*We're on  
your team,  
all the time.*

## When you partner with Goldleaf, you EXPERIENCE THE GOLD STANDARD®



### **FAST, RESPONSIVE SERVICE.**

We connect with you, learn your needs, and take it from there. We make any transition as seamless and painless as possible.



### **PROACTIVE COMMUNICATION.**

We have dedicated client relationship managers backed by a top-notch operations team. This means we are always acting in your best interest, without you asking.



### **DIRECT LINE TO A TRUSTED ADVISOR, DEDICATED TO YOUR SUCCESS.**

With us, you won't be a number in line. Instead, you'll have a direct line to someone ready to help answer your questions whenever you have them.

### **SIMPLICITY AND FREEDOM.**

We step in and manage the administration of your services, meaning you don't have to be the middleman—we take on those tasks. We work with partners behind the scenes, freeing up your time and energy.

### **TECHNOLOGY AND DATA SECURITY**

We take data security seriously, employing data encryption, maintaining alarmed and monitored data centers, and undergoing an annual audit to keep your data safe. Goldleaf Partners is continuously evaluating and deploying the latest cybersecurity technologies to ensure the integrity, confidentiality, and availability of information.



Which all adds up to  
**SATISFIED CUSTOMERS.**



# GOLD STANDARD<sup>®</sup> SERVICES

## TO MAKE YOUR LIFE EASY.

We offer a range of services, from retirement plan administration to benefits to consulting. Select the services you need or integrate in a seamlessly bundled package. It's up to you!



### RETIREMENT PLAN ADMINISTRATION

We care about our clients' retirement plans as much as our own – and that's a lot.

**Industry-leading expertise.** Our pool of credentialed professionals and actuaries are on your team, all the time.

**Dedicated service focused on you.** We have dedicated client relationship managers, backed by a top-notch operations team, taking care of all the details behind the scenes. This means we can focus on your needs and quickly answer your questions while important processing stays on schedule.

**Breadth of options for every client.** We provide a variety of solutions to meet plan sponsors' unique needs.

- 401(k)
- 403(b)
- 457
- Profit Sharing
- Church Plans
- Defined Benefit, Cash Balance
- Multiple Employer Plans (MEPs)
- Prevailing Wage/Davis Bacon
- Governmental Plans
- Non-Qualified Executive Deferred Compensation (409A)



### PAYROLL

It should be easy – and with us, it is.

**Quick, easy, intuitive.** We offer options tailored to individual clients, using an intuitive, easy-to-use system for data entry and export.

**Hands-free installation.** We understand that other providers might have a painful, time-consuming set-up process, but we have a hands-free installation option that can relieve employers of up to 90% of the work involved with a conversion.

**Automate processes and eliminate errors.** Common plan errors are solved when clients integrate payroll and retirement with Goldleaf, saving them money, time, and headaches.

**Time and attendance.** Control labor costs, increase employee accountability, and avoid unnecessary audits, penalties, and tedious administration with our automated timekeeping system.



### 3(16) FIDUCIARY SERVICES

Delegate your liability and administrative tasks to us.

**Reduce workload and increase capacity.** If you're wondering about a task, chances are we do it.

**Compliance shield backed by integrity checks.** With our proprietary software checking payroll data integrity and a dedicated relationship manager monitoring the details, we're confident your plan is safest in our hands.

**Peace of mind.** We'll fix any errors and make the right decisions that are best for the plan. And we undergo a SOC 1 Type 2 examination each year, so plan sponsors can rest easy, knowing our processes and procedures are in check.

**Client flexibility.** We offer a range of services and work with all employer sizes.

# MORE GOLD STANDARD® SERVICES

## TO MAKE YOUR LIFE EASY.

And there's more. Let us make your life even simpler. Go for Gold in everything.



### EMPLOYEE BENEFITS ADMINISTRATION

Your clients want worry-free healthcare solutions, and we provide them.

**Fight rising health insurance costs.** Decrease taxes and increase take-home pay with our service options.

**Offer depth and flexibility.** Goldleaf Partners provides a variety of consumer-driven healthcare account solutions for clients.

- 24/7 web-based portal
- Easy access to funds
- Automatic monthly reports with email alerts
- Choices for contributions: automated scheduling of lump sum, first-of-the-month, or payroll cycle



### COBRA ADMINISTRATION

COBRA administration is complex. We manage the daily intricacies.

- 24/7 web-based reporting
- Completing initial set-up and transfers
- Sending all required notices
- Managing elections and premium payments



### CONSULTING

Dealing with the IRS, DOL, and PBGC can be overwhelming and confusing — let us help.

**Experience you can trust.** Our team of ERISA consultants have a wide range of experience and knowledge, including plan design, compliance analysis, and ERISA rule explanation. We can answer your complicated questions, help you fix an error, assist with an audit, and offer alternatives to improve your plan.

**Preparation and protection.** We can review your internal plan controls to ensure you are prepared for an audit, identifying areas of risk and recommending procedural improvements.



## *EVERYTHING YOU NEED IN ONE PLACE*

Choose one or all of our services, based on your needs. Want them all? We provide one seamlessly integrated package of all our services so you can experience a simpler work life.

### *Minimize Liability.*

Feeling weighed down by risk and liability? Let us lighten that load.

By providing 3(16) fiduciary administration, clients are no longer the sole fiduciary for their plan. We join the team and help alleviate risk and reduce liability.

With our proprietary software that checks data integrity on every payroll and a dedicated, hands-on relationship manager monitoring the details, we're confident plans are safest in our hands. We review closely for any type of data integrity issues, find any errors, and correct them before they become costly mistakes.

### *Reduce Workload.*

When you integrate payroll, retirement, and 3(16) plan administrator services, you hand over your retirement plan to us and let us take it from there.



## *Increase Compliance.*

We like to follow the rules. Rest easy knowing every *i* is dotted and every *t* is crossed.

When integrating payroll and retirement, with Goldleaf Partners, there's less room for error and less liability. The most common compliance issues found by the IRS in 401(k) audits are eliminated.

All these errors are solved when you utilize Goldleaf experts and integrate services:

- Loan repayment errors
- Late deposits
- Compensation definition not followed
- Missed employee deferral opportunities
- Incorrect sources on payroll files
- Per payroll match contribution calculation errors
- Plan contribution limit failures
- Census submission issues
- Hardship distribution errors

## *Here's the Experience:*

Plan sponsors process payroll, and all other payroll and retirement plan responsibilities are completed by Goldleaf Partners.

Our data integrity checks also catch payroll errors, meaning your HRIS database and retirement plan are kept accurate and up-to-date.

# BUSINESS BY THE NUMBERS

## GOLDLEAF PARTNERS:

OVER

# 3,000

clients served



# \$ 6.5

**BILLION**  
assets managed



OVER

# 150,000

participants supported



# CPA

**CERTIFIED**  
SOC 1 Type 2 opinion



OVER

# 150



payroll data integrity checks performed when you utilize our Gold or Diamond Fiduciary Assistant®

**NOW BACKED BY EVEN MORE RESOURCES FROM:**

**FuturePlan**  
by Ascensus

# 3,300+

dedicated team members  
from coast to coast



# \$ 76

**BILLION**  
assets under administration



# 45

actuaries



# 460+

credentialed  
retirement plan  
professionals



# 30+

average years  
of experience



**W**e invite you to experience a team of professionals dedicated to you. Experience the benefits of having a single service provider for **payroll, time and attendance, employee benefits, retirement, and 3(16) fiduciary services**. Cut out the chaos and experience a new level of easy. Experience the Gold Standard®.

**Partner with us.**

Call us: 866.929.2525

Visit us online: [goldleafpartners.com](http://goldleafpartners.com)





**Goldleaf**  
**PARTNERS®**  
**EMPLOYER SERVICES**  
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