

# Company Profile

## Contact:

28 Ferry Road SE  
Fort Walton Beach, FL 32548  
1-888-777-5827

## BACKGROUND

TSA Consulting Group, Inc. (TSACG) was founded for the sole purpose of providing retirement plan compliance and administration services to 403(b) and 457(b) eligible employers. The company is an independently owned and operated plan administrator and does not market or sell investment products. Formed in 1994 by Joseph Rollins and Stephen Banks, TSACG now operates as one of the largest providers of plan services to public education employers nationwide.

## OUR EXPERTISE

More than 25 years solely dedicated to governmental employers.

Our program consultants provide ongoing support working with clients nationwide. Plan Sponsors will be assigned both a primary and secondary consultant to provide assistance with technical and plan design questions. Our consulting services, which are not replicated by any other TPA in this industry, are provided to our clients at no additional cost.

## TSACG SERVICES

Employer services are tailored to minimize employer risk while enhancing employee perception and participation in the plan. Specific services provided in TSACG's trademarked Compliance Edge® contract include:

- Onsite IRS audit assistance
- Comprehensive Plan evaluation and reporting
- Contractual Compliance Guarantee
- Provider evaluations and information sharing agreements
- Plan Document development and maintenance
- Continuous aggregation of Plan level data
- Online Plan distribution transactions available 24/7 along with plan sponsor specific webpages
- Toll-free customer services call center
- Secure online remittance service
- Contribution monitoring with corrective assistance
- Educational video presentations available to all employees – all education materials are updated annually

## Contractual Compliance Guarantee



Our confidence in the services provided by our firm is evidenced by our assuring each client of accurate administration under IRS examination

## Onsite IRS Audit Assistance



OUR COMPANY HAS ACTED AS A SPECIAL POWER OF ATTORNEY IN OVER 70 AUDITS OVER THE LAST FIVE YEARS ALL OF WHICH ENDED SUCCESSFULLY

## CUSTOMER SERVICES CALL CENTER



Available Monday Through Thursday

8:00 a.m. to 8:00 p.m. EDT

Available Friday

8:00 a.m. to 6:00 p.m. EDT

# 1.7 Million Participants

PLAN SPONSORS REPRESENTING 47 STATES NATIONALLY

