



Flexible Service Models for Your Retirement Plan

Working together with your financial advisor, MAP's service models are designed to provide the right level of plan support – from foundational administration to fully managed solutions.

NAVIGATOR

Core Plan Administration

Best Fit: Plan sponsors seeking reliable administration and compliance support while retaining primary responsibility for day-to-day plan management.

Primary Advantage: Provides a strong administrative foundation that keeps the plan compliant, organized, and operating smoothly.

Scope of Support: Traditional third-party administration services including plan design guidance, compliance testing, reporting, and ongoing technical support - delivered by experienced retirement plan professionals.

Navigator Services:

- SPD, SAR & SMM Production
- Plan Onboarding
- Design Consultations
- Administration & Compliance Testing
- Annual Admin Package
- Audit Completion Support
- Contribution Calculation Support
- Regulatory Oversight & Consulting
- Plan Termination, M&A, and Spinoff Assistance
- ERISA Bond Review
- Death Benefit Approval
- Distribution Eligibility Review
- Corrective Distributions
- Error Correction Monitoring
- Required Filings: Vesting, Hardships, Lost Earnings, Loans & RMDs Signature-Ready Form 5500

AUTO PILOT

Administration + Operational Support

Best Fit: Organizations that want to reduce internal workload by offloading routine administrative tasks while maintaining overall control of the plan.

Primary Advantage: Significantly decreases the time and effort required from HR and internal staff.

Scope of Support: Includes all Navigator services plus hands-on operational support such as census maintenance, eligibility tracking, notice distribution, transaction processing, and coordination with other service providers.

All Navigator Services Plus:

- 404(a)(5)/404(c) Notice Production
- 408(b)(2) Notice Production
- Physical Mailing of Required First Notice (available)
- Required Minimum Distributions
- Participant Force-Out Processing
- Verification and Approval of Termination Distributions
- Approval and Reporting of Participant Loans, including Loan Default Monitoring
- Administration of termination, retirement, hardship, and other permitted in-service withdrawals

CHAUFFEUR

3(16) Fiduciary Administration

Best Fit: Plan sponsors seeking professional fiduciary support for administrative responsibilities and regulatory obligations.

Primary Advantage: Transfers key administrative fiduciary duties to experienced specialists, reducing risk and oversight burden.

Scope of Support: Includes all Navigator and Auto Pilot services plus 3(16) fiduciary service, execution of plan documents, Form 5500 filing support, fiduciary reporting, and formal oversight of administrative functions.

All Auto Pilot Services Plus:

- 3(16) Fiduciary Service
- Listed as Designated Plan Administrator
- Sign & Submit 5500 Report
- List MAP Retirement as the Fiduciary Contact for the Plan
- Physical Mailing of Required First Notice (included)

P.A.M. CHAUFFEUR

Comprehensive Plan Administration & Mgmt.

Best Fit: Organizations that want a fully supported, turnkey retirement plan solution with minimal internal administrative involvement.

Primary Advantage: Provides the highest level of support, allowing leadership and staff to focus on core business priorities rather than plan operations.

Scope of Support: Includes all services from lower tiers plus expanded fiduciary authority, service provider coordination, regulatory oversight, plan maintenance, and end-to-end administrative management.

All Chauffeur Services Plus:

- P.A.M. Chauffeur includes the Fiduciary duty of hiring and firing selected plan service providers except your plan's financial advisors
- Co-sign the Recordkeeping Agreements & Documents
- Co-sign the Plan Documents

Additional Services Available:

- Plan Document Maintenance
- Payroll Submission