



NICHOLAS PENSION CONSULTANTS

Plan Design & Administration



Owners: Ken Roberts, Adam Zuro, Leonard Roberts, Patrick Collar, Warwick (Nick) Nicholas & Andy Wass

About Us

NPC is a third party pension administration firm. We specialize in quality plan administration and do not provide investments or insurance services. Our local consultants are strategically placed to service over 3,000 plans in the western states.

Services

Nicholas Pension Consultants provides plan consulting and design, document installation, contribution calculations, compliance testing, IRS and DOL reporting for qualified retirement plans. We've developed a regional administration system that is designed to ensure superior quality while keeping costs competitive. Each client is assigned a local consultant and an administrator. Our administrators have over 300 years of combined experience and hold over 5% of all the ERPA designations in California. The ERPA (Enrolled Retirement Plan Agent) credential provides designees with the authority to represent Plan Sponsors before the IRS and DOL. The administrator handles all day-to-day concerns, while the consultant is available for working with the client and advisors to ensure each plan design is the best fit for the company's needs.

What you can expect from us

Our trademark is our excellent service which has been recognized in the industry and more specifically by INC 5000 and the Sacramento Business Journal as one of the fastest growing companies in the region and country. In addition, numerous national investment companies and broker dealers have screened and accepted Nicholas Pension Consultants onto their preferred list of service providers. We value our relationships with some of the best investment and insurance companies in the business. We work hard at maintaining a strong partnership relationship. Please contact us with any questions or to meet.

401(k) Profit Sharing Plan Fees

Document / restatement (owner only \$750 / takeover no charge).....\$1250 + \$10 per eligible participant
Administration (owner only \$750).....\$1450 + \$30 per eligible participant

Please see Fee Schedule for complete list of fees including Age Weighted, New Comp, Defined Benefit, DB/DC Combo or 403(b) Plans.

San Francisco

Leonard Roberts
(925) 299-9020
leonard@nicholaspension.com

South Bay Area

Patrick Collar
(925) 829-6700
patrick@nicholaspension.com

East Bay Area

Adam Zuro
(925) 964-9404
adam@nicholaspension.com

Danville

Warwick (Nick) Nicholas
(925) 855-8070
nick@nicholaspension.com

Sacramento & Reno

Ken Roberts
(916) 934-3880
ken@nicholaspension.com

Rancho Cordova

Andy Wass
(916) 316-7177
andy@nicholaspension.com

Southern California

Scott Blaney
(949) 412-8223
scott@nicholaspension.com

Affiliated Offices

Colorado, Oregon, & Washington