



NICHOLAS PENSION CONSULTANTS

Plan Design & Administration



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

Nicholas Pension Consultants

We specialize in quality retirement plan administration with local service at a reasonable cost. We are a third party pension administration and consulting firm that does not handle any investments or insurance. We offer flexibility through individually designed plans and the freedom to choose investments. We currently administer approximately 4,000 retirement plans, which represent over 50,000 participants and over 4 billion in assets.

Service

We provide 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 staff has hundreds of years of combined experience and holds a significant percentage 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 consultants are strategically located to work closely with our clients and their advisors to ensure each plan design is the best fit for the company's needs.

Expertise

Our trademark is our excellent service which has been recognized in the industry and more specifically by INC 5000 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 \$850 / takeover no charge).....\$1550 + \$10 per eligible participant
Administration (owner only \$850).....\$1850 + \$30 per eligible participant

Please see Fee Schedule for complete list of fees including New Comp, Defined Benefit, DB/DC Combo, Cash Balance 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

Southern California & Rancho Cordova

Andy Wass
(949) 412-8223
(916) 316-7177
andy@nicholaspension.com