

## TSA Consulting Group, Inc.

### CONTACT INFORMATION

**TSA Consulting Group**  
Retirement Plan Compliance  
and Administration

15 Yacht Club Drive NE  
Fort Walton Beach, FL 32548  
(888) 777-5827  
www.tsacg.com

### COMPANY 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, fee-based 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.

### MISSION STATEMENT

TSA Consulting Group, Inc. is committed to providing the most accurate and complete plan compliance and administration services to its clients. We will continue to develop and maintain the most up to date information systems available for plan sponsors and employees, which ensure the viability of their retirement savings programs. We will maintain professional and ethical standards and seek to continually improve the skills and knowledge required to facilitate the superior performance of our duties in the service of our clients.

### EMPLOYER 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:

- Comprehensive Plan evaluation and report (policies and procedures)
- Provider evaluations and service agreements (employer due diligence)
- Plan Document development and maintenance
- Continuous aggregation of Plan level data with demographic files
- Online Plan distribution transactions available 24/7 along with plan sponsor specific webpages
- Toll-free customer services call center
- Secure online remittance services through EPARS
- Contribution monitoring with corrective assistance for prior years
- Employee educational materials specific to the plan and scalable from summary plan descriptions to complete employee retirement benefit guides – developed and produced in-house by TSACG
- Educational video presentations available to all employees – updated annually
- Onsite IRS audit assistance

### Web-based Employer Services

#### Online Transaction Processing – ART

TSACG maintains an advanced Web-based system for use by Plan Sponsors and participants. The Aggregated Records and Transactions or “ART” system provides Plan level reporting for the Plan Sponsor and allows participants to gain immediate approval certification for eligible transactions. The ART system is available 24 hours a day, seven days a week.

## EPARS System

The Electronic Process for Automated Remittance Services or "EPARS" allows the Plan Sponsor to combine multiple provider remittances into one deposit via wire transfer and transmit remittance data utilizing a secure Web-based application. The Plan Sponsor maintains full control of remittance funds and significantly reduces administrative tasks and errors during the process. EPARS allows contribution remittances to be deposited within 24-48 hours while offering the maximum protection possible for private participant information. Both Wells Fargo and J. P. Morgan/Chase serve as bank transfer agents for EPARS.

## CLIENT BASE

TSACG provides all services under multi-year contracts with public K-12 school districts, colleges and other governmental employers with the majority of these being three to five year contracts. The Compliance Edge<sup>®</sup> program has been adopted by employers in forty-seven (47) States nationally representing over 2,000 plans with more than 1.2 million participants and more than 2 million employees. TSACG clients include 12 of the 25 largest public K-12 school districts in the U. S.

A complete client listing is available from TSACG.

### GENERAL CONTACT INFORMATION

**Joe Rollins**  
President  
(850) 244-7306 x. 1102  
jrollins@tsacg.com

**Steve Banks**  
Chief Operations Officer  
(850) 244-7306 x. 1104  
sbanks@tsacg.com

### CONTACT FOR TPA PROPOSALS

**Janet Williamson**  
Chief Financial Officer  
(850) 244-7306 x. 1122  
jwilliamson@tsacg.com

**Sherry Marcolongo**  
Program Services Manager  
(850) 244-7306 x. 1120  
smarcolongo@tsacg.com

