



ROBERTSON RETIREMENT LAW, LLC

How We Can Help

With more than 35 years of experience working with qualified and non-qualified retirement plans, Adrienne Robertson brings both strategic and practical perspectives to issue resolution. She is the author of the 2024 and 2025 401(k) Answer Book and a contributing author to 401(k) Advisor, is a frequent presenter at industry conferences, and is actively involved with industry and trade groups. SECURE 2.0 compliance is a current area of focus.

SERVICES FOR PLAN SPONSORS

- Compliance Support
 - Employee Plans Compliance Resolution System (EPCRS)
 - Corrections Calculations
 - Delinquent Filer Voluntary Compliance Program (DFVCP)
 - Voluntary Fiduciary Correction Program (VFCP)
 - Representation in IRS Audits and DOL Investigations
- Plan Document Support
 - Individually Designed Plan (IDP) Document Drafting
 - Pre-Approved Document Amendment and Restatement Review
- Business Support
 - Merger and Acquisition Guidance
 - Controlled Group Analysis
 - Affiliated Service Group Analysis
- Operational Compliance
 - Plan Design Consultation
 - QDRO Determinations
 - Fiduciary Training and Guidance
 - Legislative and Regulatory Updates
 - Plan Terminations and Conversions

SERVICES FOR PROVIDERS (TPAs, Advisors, Recordkeepers, CPAs)

- Speaking Engagements; Webinars; Presentations
- Technical Training and Training Programs
- Compliance and Corrections Support
- Service Agreement Support
- Client Support
- Audit Support



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