Benetech

5 Reasons Advisors Should Work With an Experienced TPA

Great plan advisors serve as trusted quarterbacks for their clients. They assemble the very best team of professionals they can to help move their clients toward their business and personal goals. Here are five reasons to align your practice with an experienced third-party administrator (TPA) like Benetech that understands how to help make your practice more successful:

1 Increase sales opportunities and close ratios.

Having an independent, investment-neutral technical expert on your team enhances your team’s credibility with prospective clients, and improves your close ratio.

2 Boost client retention rates/tenure.

We maintain close relationships with our clients, which helps us maintain a very low client loss rate. This is one of the main reasons recordkeepers are unbundling their services to work TPAs like Benetech.

3 Benefit from focused expertise, training and technical support.

Benetech can provide you with sales assistance, training, and technical support – whether you are an expert or a novice in the 401(k) arena.

4 Leverage a single point of contact.

Benetech is neutral regarding investments and asset size. By working with us, you have a single point of contact regarding compliance issues for all of yours plans: from start-ups to large 401(k) Plans.

5 Promote capabilities that extend far beyond payroll.

Benetech helps clients avoid problems with the IRS by doing accurate work and asking critical questions each year. This helps keep our clients in compliance with IRS regulations.

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