

# SUMMARY OF SERVICES



## The Rainmaker Plan®

### Establishment of The Rainmaker Plan and C-Corporation

**\$4,995**

*Our price for setting up your Rainmaker Plan & C-Corporation includes the following services:*

- Incorporation Services
- Federal Employer Identification Number (EIN)
- Articles of Incorporation
- Company by-laws, minutes & stock certificates
- Plan/Adoption Agreement setup
- Initial stock valuation for the newly created C-Corporation
- Unlimited consultation with your own Retirement Plan Analyst on the design and compliance requirements for your new retirement plan/adoption agreement

### Ongoing Retirement Plan Administration

**\$145/month**

*Benetrends provides professional plan administration to keep your plan in compliance and help you get the greatest benefits from it. These services are provided by retirement plan services professionals and include the following:*

- Yearly preparation of Form 5500/Summary Annual Report
- Dedicated Retirement Plan Analyst
- Annual Compliance Testing/Annual Contribution Limit Review
- Calculation of Retirement Contributions
- Determine Employee Eligibility and Vesting
- Distribution Processing/1099 R Form
- Preparation/Participant Loan Processing
- Review and Reconcile Account Statements
- Annual Fair Market Value Oversight Support
- Required Plan Amendments and Restatements
- Plan Design and Contribution Consulting
- Tax Savings Strategies (i.e. Contributions, Stock vs. Asset Sales, etc.) as related to the retirement plan
- Provide Employer with Required Employee Notifications

#### Annual Participant Fee

0-25 Participants	\$0 (included in base price)
Over 25	\$20 per Participant

*The monthly retainer fee of \$145 begins 30 days after Engagement.*

## SBA Services

### Pre-Qualification

**FREE**

### Loan

**\$1,000-\$2,500**

## Other Services

<b>Incorporation Only</b>	<b>\$400 + State Filing Fees</b>
<b>LLC</b>	<b>\$400 + State Filing Fees</b>
<b>DBA</b>	<b>\$100 + State Filing Fees</b>
<b>Foreign Entity</b>	<b>\$300 + State Filing Fees</b>
<b>Revocation</b>	<b>\$500</b>
<b>California Expedite Fee</b>	<b>\$600</b>