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SUCCESSFUL PLANS HAVE EXTENSIVE RESOURCES

Significant Experience. Your Hunter Benefits Team understands best practices in plan design and how to create a great fit between the Sponsoring Employer and staff dynamics. Your Consultants have over 100 combined years of Retirement Plan experience and advanced designations – they see how your business and plan need to work together in evolving markets and business conditions.

Broad Range of Clients. From large plans to owner only plans, Hunter Benefits has clients in a wide range of industries and ownership structures.

Deep Understanding. Your Hunter Benefits Team combines broad experience in the retirement industry and business strategies with a staff that has extensive solution-oriented knowledge.

Hunter Benefit's Value. Successful plans have strong professionals in three areas for comprehensive balanced support:

- Third Party Compliance Consulting – Hunter Benefits (TPA)
- Financial Advisor – managing investments and participant education for your plan
- Recordkeeper – custodian of the investments, tracks participant accounts and provides participant services

Hunter Benefits Supports:

- 401(k)
- Cash Balance
- Defined Benefit
- Cross Tested Plans (401(k) and Cash Balance Combos)
- Owner Only 401(k)
- Owner Only Defined Benefit
- 403(b)
- 457(h)


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CLEARING OBSTACLES SINCE 1999
Hunter Benefits is a national TPA with offices in Chicago, Denver, Seattle and Spokane and clientele in over 40 states, Canada and Europe.
We're large enough to handle the tough stuff ...and small enough to care.

FOUR KEY ELEMENTS TO A QUALIFIED RETIREMENT PLAN

Plan Sponsor. Usually the employer. Responsible for hiring the other three elements, making contributions, helping Participants enter the Plan and filing the Form 5500.

Third Party Administrator. The TPA helps the Plan Sponsor keep the Plan in compliance. Prepares the documents, the Form 5500, contribution calculations, distributions and more.

Financial Advisor. Helps the Plan Sponsor pick the right funds for the Plan and helps to educate the Participants about how much to contribute and which funds to pick.

Record Keeper. Holds the assets of the trust, completes and tracks all transactions, making them available on the web and via quarterly statements. Assists with enrollment and education support.

HUNTER BENEFITS' CAPABILITIES COVER NEW PLANS AND OLD, LARGE AND SMALL

Plan Size. With the right financial advisor partner and record keeping partner, we can handle anything from a one person 401(k) plan to 5,000+ participant 401(k) plan. Customizing the plan document to meet the needs of the Sponsor is standard practice. We strive to support the Sponsor's responsibilities to maintain plans via service and consultation. Small plans often need management support. Large plans need annual audit support. We do it all.

Securing Data. We understand the importance of receiving, transferring and securing plan sponsor and participant data. We employ a recognized standard in the industry – the Ft Williams secure client portal uses 256-bit bank level encryption. This functions as both an archive for the important files a plan fiduciary needs to maintain and keep track of, as well as a secure way to send and receive sensitive data between Hunter, Sponsors, Advisors and CPAs. The portal has the capability of providing secure access to advisory and accounting partners to allow for easy access of data Sponsors need to share.

Special Projects. Hunter Benefits has the resources to assist Employers, Advisors and CPAs who have very specific one-time needs. This includes helping clients get caught up on delinquent Form 5500 filings, specialized custom plan operation reviews, QSLOB (Qualified Separate Lines of Business) calculations, plan discrimination corrections, plan terminations, etc.

IRS and DOL Audit Support. Larger organizations' Plans need additional support to conform with annual filings. We have extensive knowledge and experience with these plans and will work efficiently and quickly with your auditing firm. We provide specialized consultation when auditors need answers to minute plan details or census and record keeping questions.

Team Approach. As a multi-office, national TPA, we focus on ensuring our staff acts as a team to offer unparalleled and seamless service to clients. We believe that as professionals with complementary backgrounds and skills, we work well together to accomplish the goals and needs of clients. We strive to empower and educate the Team, so no one ever misses a beat. Add in a little fun and workplace comradery, our Team enjoys the work they do and the clients they serve. With your Hunter Benefits Team, there will always be someone available to answer your questions. Team members work together to service plans, meaning we know you and your plan.

Flexible Plan Design. Whether you are looking for simple tax savings, complex corporate strategies focused on maximizing contributions and savings, or offering a meaningful workplace benefit, we expertly design plans to fit those goals. Through essential fact finding and learning about your business, analyzing current corporate structures and finances, we can offer plan designs that support the business and the people.

THE HUNTER BENEFITS TEAM

Administrators

Angela Handzic is an Illinois native who has worked in the retirement benefits field since 2000. Throughout her career she has developed extensive knowledge of plan design, documentation and the intricate details of ERISA compliance. As a skilled plan administrator, she creates and services defined-contribution plans and provides outstanding service for Hunter Benefits clients. Angela is a graduate of College of DuPage and an active member of the American Payroll Association.

Bethany Coldwell joined the qualified retirement field in 2004, beginning her career in Washington State and moving to Colorado the following year. With extensive experience in retirement and wealth management, she has worked closely with plan sponsors and participants to help them meet their business and personal objectives. Bethany is a Qualified 401(k) Administrator (QKA) who enjoys snowboarding, world travel and origami.

Dottie Tzumas has served clients in the retirement benefits industry since 1978, gathering a wealth of experience in plan conversions, installation, compliance, contribution calculations, asset reconcileation, audit assistance and much more. She has earned the Qualified 401k Administrator designation and is greatly valued by HBCG clients for her knowledge and expertise.

Gayle Goodwin specializes in defined benefit and cash balance plans. She has worked in the qualified plan compliance field since 2006, helping companies of all sizes to establish and maintain well-designed plans. Gayle enjoys the challenge of keeping abreast of ever-changing IRS and Department of Labor regulations, sharing continuous updates with HBCG clients. A California native, she is a graduate of San Diego State University.

Scott Sevigny entered the retirement benefits field in 1997, earning his Accredited Pension Administrator designation soon afterward. In 2004 he co-founded Carlson & Sevigny TPA Services, which became part of Hunter Benefits in 2018. Scott is an expert pension consultant in our Spokane office, offering special expertise in cross-tested contribution allocations for defined contribution plans. He enjoys fishing, golfing and Gonzaga State basketball.

Documents and Compliance

Heidi Wade entered the retirement benefits field in 2004. She is valued for her in-depth skills in plan administration, reporting, documentation and compliance, with specialization in onboarding new plans with minimum stress for her clients. Heidi earned her master's degree in human resources management from Roosevelt University and is a certified Profes-ional in Human Resources (PHR), a Qualified 401k Administrator (QKA) and a Tax-Exempt & Governmental Plan Consultant (TGPC).

Carol Colby has been in the qualified plan compliance field since 1986. She has done administration and compliance in many of the different service settings, including Putnam Investments, New England Life and Laventhol & Horwath as well as Third Party Administrators in Boston and in Illinois. She has experience in teaching staff to conduct compliance and administration processes for both small employer and large regional, national and multinational corporate clients.

Kimberly Jones has worked in the retirement planning field since 1993. She began her career on the plan-sponsor side, helping participants plan for a secure future. Kim transferred her extensive talents to the third-party administration field in 1995, serving clients at Coopers & Lybrand, Buck Consultants and Merrill Lynch. Kim is a graduate of California State University, Long Beach.

Executive Team

Christopher Tipper began his career in retirement benefits in 1990, founding Hunter Benefits in 1999 and quickly rising to prominence as an expert who challenges fellow plan consultants to continuously improve business practices, adapt to rapidly changing trends and provide cost-effective, meaningful services for their clients. He oversees new client development and marketing and serves as an expert speaker at major industry events. A graduate of Knox College, he enjoys cars and travel.

Katherine Tipper joined Hunter Benefits in 2004 after more than a decade of helping Starbucks Coffee make its successful start in Seattle. She oversees the financial activities of the firm's operations in Illinois, Washington and Colorado, applying her keen sense of strategy and business development to establish high standards for client service across the enterprise. Katherine is an alumna of Knox College and an active leader in the National Organization of Women Business Owners (NAWBO).

Dusty Rhodes is the anchor of Hunter Benefits administrative team, able to put clients in touch with Christopher and Katherine Tipper at any moment of the day or night and serving as a trusted resource for all. He attended the University of Minnesota, moving his talents to the retirement benefits field in 2015.

Hunter Benefits has additional staff in the Midwest and West and continues to grow talent and resources to serve Hunter clients.

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