



CMAA Club Retirement Plan

Provide a superior retirement plan, have potential cost savings and spend less time with plan administration

The advantages of adopting the CMAA Club Retirement Plan

Potential cost savings

- No annual audit requirement or fee
- Form 5500 filing is transferred to the CMAA Club Retirement Plan
- Complete open architecture
- No costs associated with plan document maintenance, restatement or amendment responsibilities

Participant education and resources provided by Empower Retirement

- On-site participant education
- Online tutorials
- Award-winning participant flyers
- Quarterly statements
- Electronic participant newsletters
- Online requests for loans, distributions and hardships
- Online investment fact sheets and prospectuses
- Annual fee disclosure statements

Fiduciary support

3(38) Investment Manager Case Pearlman Retirement Plan Advisors, LLC

- Completes the selection and monitoring of investment portfolio in accordance with the Investment Policy Statement (IPS)
- Monitors fees to ensure they are reasonable

Administrative support

3(16) Plan Administrator Dorsa Consulting Services, Inc.

Provides employee notices, eligibility tracking and distribution management

- Interprets and enforces plan document
- Ensures IRS and Department of Labor compliance
- Flexibility in plan design
- Includes an ERISA attorney as part of the compliance team
- Association members are able to maintain unique plan design features, such as vesting schedule, type and amount of employer match, Roth option, plan loan availability, and hardship withdrawals

For more information, contact Dennis Pearlman at 855-482-8002 or visit cmaa.org.

The CMAA Club Retirement Plan is designed specifically for all CMAA members.

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