



## INTRODUCING NEXT GENERATION: Your Solution for Lost Participant Accounts and Automatic Rollover Accounts

**Are you grappling with the challenges of managing lost participant accounts or navigating the complexities of automatic rollover accounts?** Look no further than Next Generation – your trusted partner in retirement plan administration. At Next Generation we understand the intricacies and importance of safeguarding retirement assets and ensuring compliance with regulatory requirements. That's why we've developed comprehensive solutions tailored to address the unique needs of plan sponsors and participants alike.

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We can accept automatic rollovers for accounts under \$7,000 and, if your plan documents allow for it, we can accept accounts over \$7,000 for other lost participants.

### OUR SERVICES:

**Lost Participant Account Solutions:** Don't let lost participant accounts become a headache for your organization as well as a financial burden to your plan costs. We accept lost participant accounts as rollover accounts, preserving the tax advantaged status of the account while removing the burden from employers and saving money spent on administration fees. Our expert team then conducts thorough searches to locate missing participants and reunite them with their retirement savings. From leveraging advanced search techniques to utilizing industry-leading databases, we leave no stone unturned in our quest to reunite participants with their hard-earned assets.

**Automatic Rollover Account Management:** Say goodbye to the administrative burden of managing automatic rollover accounts. Our streamlined processes ensure seamless rollovers for participants with small balances, helping to consolidate assets and reduce plan costs. With Next Generation handling the heavy lifting, you can rest easy knowing that your automatic rollover accounts are in capable hands.

Have a plan that is terminating? Next Generation should be your first call as we can easily take all the participants you can't locate and maintain the tax advantaged status of their funds.

Have distribution checks that are uncashed? Call Next Generation and we can also take those accounts and funds.

## WHY CHOOSE NEXT GENERATION:



**Expertise:** With years of experience in retirement plan administration, our team brings unparalleled expertise to the table. We stay abreast of the latest regulatory changes and industry best practices to deliver solutions that exceed expectations.



**Customer Service:** Our customer service is unsurpassed in the industry. We have a live person answering our calls during normal business hours. You won't find an automatic attendant with endless prompts. Our staff is well trained and well credentialed in the industry and are standing by to assist in every step of the process – for you and your participants.



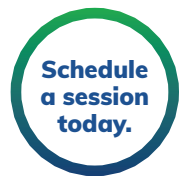
**Compliance:** Trust is the cornerstone of our relationship with clients. Rest assured, our services are fully compliant with all regulatory requirements, including those set forth by the Department of Labor, the Employee Retirement Income Security Act (ERISA) and the Economic Growth and Tax Reconciliation Relief Act (EGTRRA).



**Personalized Support:** We understand that every plan is unique. That's why we offer personalized support every step of the way. Whether you have questions about lost participant accounts, automatic rollovers, or any other aspect of retirement plan administration, our dedicated team is here to help.

## PARTNER WITH NEXT GENERATION TODAY:

Take the stress out of managing lost participant accounts and automatic rollover accounts. Partner with Next Generation and experience the difference firsthand. Contact us today to learn more about our services and discover how we can help you achieve your retirement plan goals.



To schedule a complimentary educational session or discuss our service offerings for advisors, please contact us.

**888-857-8058 • [www.nextgenerationtrust.com](http://www.nextgenerationtrust.com)**