HICKS NOTES

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NHHICKS.COM: WE ARE ALL ABOUT YOU!

We are excited to bring you everything you need to sell and service retirement plans. We have spent the last few years gathering resources and links to help you get more retirement plan clients. While our website is an important resource tool, we know that business is still best done person to person, face to face. This website is just a value added benefit for you, your clients and advisors. This month's newsletter will highlight some areas of particular interest.

It always starts with our people. Many clients are frustrated by turnover, inexperience or just plain bad service from bundled providers. Each our administrators have been with us over 10 years. They are given a block of clients and handle each client's calls and administration from beginning to end. No passing the buck. Check out our staff of administrators and their experience here. We are proud of our staff and here's what our clients have to say about our administrators and our firm.

For marketing, technical or legal help, Tom Hicks, Attorney at Law, Debbie Rath and Samantha Nethington make up our marketing team. We are available for questions or proposals. With over 60 years of combined experience, there is nothing we haven't heard or seen. Just give us a call, email or contact here.

Need client forms? We have a link to forms and bits of information a client may need for distributions, hardships, participant notices and a compliance calendar to follow throughout the year. These forms are up-to-date and help move the administration process along. Check them out here.

Prospective clients are always asking for simple explanations for different plan types or legal issues. From one-person plans, defined benefit contributions or 401(k) overviews, we have simple explanations that can be given to clients to better help them understand these plan issues. In addition, our simple legal overviews give explanations for controlled groups, compliance issues, missing participants and what the federal agencies are looking for when auditing. See them here.

For Financial Professional needing to bid investments for retirement plans, we have a list of investment providers and their contact emails. Simply send them some facts on your client and you can shop and compare appropriate 401(k) investments through this easy time saving link.

In addition, we have links for basic proposal requests, fees, our brochure and information needed to take over a plan. Simply click here and you will find everything you need to get started with a client.

Need help understanding the new disclosure regulations? Here is the basic information you need to know to help your clients do their duty.

Did you know that many administrators are getting paid by investment companies and keeping the money in addition to charging their annual fees? Not us. Here is our billing policy to credit any third party payments back to the clients. Honesty is everything!

And of course, we have an extensive FAQ section for questions on investing in real estate, CPA audits and 5500 filing issues. Check for your answer here.

Our HICKS NOTES newsletters cover a variety of topics including the various roles of advisors, recent court decisions, and why an unbundled provider is a better solution to most clients needs. These can be emailed to clients in marketing situations where they want basic information on various topics. Check through the various years here.

Finally, we are happy to provide free CE credits for CPA's and CFP's as a way to thank you for your business. We have scheduled 3 hours each, in June and July. These are great educational webinars that will give anybody a basic understanding of all areas of retirement plans. Please join us here to view the invitation and sign-up.

As always, we are constantly improving ourselves and our business. We are excited for what the rest of 2016 has in store for us. Thank you for joining us as we grow and keep happy retirement plan clients!! We are here to help.