



Employer Plans by Design

Benefits and Services for PASBO Members

When considering a firm to assist you with 403(b) plan consulting and third-party administration services, retirement plan services, Section 125 plans, and voluntary insurance programs for your school district, trust is a vital component of what you need in the relationship. Your expectations of the team you work with to design, administer, and oversee your retirement plan and voluntary benefits are high. There is a lot at stake for you and your staff.

At Kades-Margolis, we pride ourselves on building relationships based on trust. Since 1974, we have worked with many school districts and their employees throughout Pennsylvania. Today, we offer Employer Plans by Design. These services can help you and your staff deliver an excellent retirement plan experience for your participants, while at the same time, providing more value-added benefits.

Here is a list of benefits and services we provide to many PASBO members:

- 403(b) third party administration through an independent TPA
- Act 93 and personal contract compensation agreement ideas
- Financial workshops for school employees
 - What you need to know about your retirement system
 - The state of the economy and financial markets
- SAGE College Tuition Rewards Program
- Implementation of Employer Plans:
 - 457(b) Deferred Compensation Programs
 - 403(b) Severance Plans
 - Roth 403(b) and Roth 457(b) programs
- Voluntary Group insurance programs for administrators:
 - Universal and term life insurance
 - Cancer, other illness and wellness insurance
 - Critical care insurance
 - Accident insurance
 - Disability insurance
- 403(b) Plan Consulting Services
- Section 125 Plans
- Investment and retirement planning services offered through Kades-Margolis Corporation

KADES-MARGOLIS



Your Trusted Investment and Retirement
Planning Partner Since 1974

Our Employer Plans Department is ready to assist you. For more information or if you would like to meet to discuss how we can assist you and your staff, please call 800-433-1828, ext. 3.

Securities and Advisory Services offered through GWN Securities, Inc. also a Registered Investment Advisor, 11440 North Jog Road, Palm Beach Gardens, FL, 33418, 561-472-2700.
Member FINRA & SIPC. Kades-Margolis and GWN Securities, Inc. are not affiliated.