

Client /Consultant Collaboration | Expanded Teams



Clients work with experts in benefits from a variety of perspectives – emerging products, legal, tax, technology, administration and communication.

Balser distinguishes itself in service by approaching each deferred compensation plan with a cross functional , knowledgeable implementation team that offers know-how that reaches beyond typical enrollment, account administration, funding and other processing.

With an expanded team of advisors– design, administrative, communication, funding– Balser anticipates the “expression” of the plan and what will be needed by Balser and the plan sponsor to properly support to plan from implementation to years into the future.

To collaborate with the client and design an effective benefit plan, it is important to include plan designers, plan managers, technology experts and financial advisors. For example, Balser Companies will analyze a number of factors that will affect the plan’s features, the executives, the employer, cost/liability, and funding strategy.

How is a feature easily communicated? How is it handled administratively and through technology? How is it “date stamped” and recorded. We are always able to respond with a solutions. However, it’s important to consider the best solutions from many angles and select the right one.

We do the “heavy lifting” for the supplemental and nonqualified plan needs which allow the plan sponsor to showcase the plan’s value.

