

Recordkeeping Services

Future Functionality



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We have always viewed our services as suited for custom plans that are affected by a company's needs— so we must keep building better systems.

Conversation leads to Next Steps System Improvements for 2008

As nonqualified benefit plan specialists, we support a myriad of permutations of the same concept in retirement solutions. Truly, one of the strengths of nonqualified deferred compensation arrangements is that they offer great flexibility and can be align to the corporation's objectives— and even specific executive goals. Administratively and technically, this requires a state-of-the-art platform. From this stable foundation, we can build the right custom solution for any plan.

Client and Partner collaboration influence these custom plans with every new idea. Front-end enhancements are based on specific plan / client / customer needs and requests, and occur frequently throughout a given year. Of course, we remain client focused with custom plan solutions, but also need to regularly step back, identify themes, and orchestrate system-wide enhancements. In 2006, for example, system enhancements began moving away from Retirement Technologies (SchwabRT) and SQL to Oracle; and, moving away from Microsoft to Sun/Linux; and, unifying all code to pure Java, migrating from CFMX which is an interpretative Java language that is currently used.

All Boats Rise at High Tide

More broadly, we must consider retooling the front end website— improving the system as a whole-- changes that will significantly improve the participants' and plan sponsors' online experiences.

Most significant changes of this magnitude are announced and discussed with the plan sponsors, and released at the end of Q1— in 2008 we plan to implement our latest recordkeeping enhancements. Given the collaborative element of our approach to service, clients are already involved in the outcome. Although executives are often compared to ball players, we cannot afford an attitude that “if we build it, they will come.” Custom plan mean client involvement and influence at the core.

