



Distributions →

The fast, easy way to **manage** benefit distributions.



Free up time. Increase productivity.

Lighten your administrative workload with PenChecks Trust® streamlined and effective payment processing services.

» Express Distributions

Basic service level includes:

- Process payment to participant
- Process and file 1099-R forms
- Remit federal and state taxes
- Manage and resolve all outstanding checks
- Can be used for all plan types

» Premier Distributions

Turnkey solution includes all Express services, plus:

- Address search
- Collect and process participants' benefit elections
- Send benefit election notices via certified mail
- Automatic Rollover IRA options for unclaimed funds
- DOL FAB 2014-01 and Safe Harbor compliant

» Recurring Benefit Payments

- Processes pension plan payments
- Monthly, quarterly, biannual or annual benefit payment processing options
- Includes tax withholding, remittance & 1099-R processing

» 1099-R Only Service

- Process and file 1099-R
- Available for all plan types

» 1099-R and Tax Payment Service

- Remit tax payment to appropriate tax authorities
- Plus, all 1099-R Only Service items above

We're here to help.

Friendly U.S. based bilingual call center at your service.

» End-to-end distribution solutions where, when and how you need them.

Talk to the experts → 800.541.3938

Timely, accurate and **cost effective.**

» Save Time

- Increase efficiency with automated online processing
- Eliminate bulky distribution packets and other paperwork
- Streamline tax withholding, payments and reporting

» Reduce Risk

- Avoid tax withholding and payment penalties
- Stay current with IRS tax and participant notifications
- Monitoring and resolution of outstanding distribution checks

» Lower Costs

- Shrink your workload, not your fees
- Reduce administrative costs
- Deduct processing fee from participant distributions

Save time and money
with PenChecks ESOP
and Defined Benefit
Distributions →

Simplify your business,
work with the experts.

Save up to **40%**
on your Payment
Processing costs.

Get started today →

800.541.3938 / [PenChecks.com](https://penchecks.com)

Your
one-stop
solution.