

Firm Highlights



Firm Profile

Ekon Benefits is the trusted partner for group retirement plan consulting and administration, specializing in services for employer and jointly sponsored retirement and health and welfare plans. With roots in St. Louis, Missouri, Ekon Benefits partners with more than 350 clients around the United States. Our associates have an average of 14 years of qualified plan experience, with extensive expertise in 401(k) daily participant recordkeeping and Defined Benefit actuarial services.

Since 1981, the employees of Ekon Benefits have made it their mission to meet the specific needs of each client by providing comprehensive, customized service at a reasonable cost. To learn more about Ekon Benefits, please visit www.ekonbenefits.com.

Primary Markets Served

Micro (< \$1 million)

Small (\$1 - \$10 million)

Mid (\$10 - \$100 million)

Taft-Hartley & Governmental

Ekon By The Numbers

Number of Plans / Participants

Categorized by Plan Type as of 12/31/15

401(k) - 199 / 8,697

403(b) - 6 / 943

Money Purchase - 10 / 2,670

457 - 6 / 692

Non-Qualified - 6 / 99

Defined Benefit - 77 / 15,019

Cash Balance - 8 / 75

ESOP - 6 / 360

Health & Welfare - 36 / 1,892

Plan Sponsor Support Services

Comprehensive Plan Administration & Consulting

Preparation & Filing of Plan's Annual Tax Return

Annual Compliance Testing

Company & Employee Meetings

Maintenance of Participant Accounts

Dedicated Plan Specialist - Single Point of Contact

Complete Defined Benefit Actuarial Services

Sponsor Online Account Access

Monthly *Your Trusted Source* Newsletter

Participant Support Services

MyEkon Participant Online Account Access

Dedicated Plan Specialist - Single Point of Contact

Retirement Income Estimates

In-Plan Lifetime Income Options

Rollover Services

Mobile Account Access

Mutual Fund Trading Partners

AllianceBernstein, Allianz Global Investors, American Century, American Funds, Buffalo Funds, Calamos Investments, Columbia Funds, Dodge & Cox Funds, Federated, Fidelity Investments, Franklin Templeton, Goldman Sachs, The Hartford, Invesco, Janus Capital Group, Lord Abbett, MetLife, Oppenheimer Funds, Pimco Bonds, Pioneer Investments, Putnam Investments, Russell Investments, The Standard, T. Rowe Price, Touchstone Investments, The Vanguard Group, and Van Kampen Investments