



**NOBLE  
DAVIS**  
CONSULTING, INC

Retirement Plan Compliance Specialists

# SMART



Based in Solon, Ohio our firm has been helping small businesses with their retirement plans since 1987. We serve over 500 clients, 20,000 participants and handle over \$1 billion in retirement plan assets. We take responsibility for your retirement plan so you can focus on your business.

## **We Are Experienced and Exact**

- We have a 308 point checklist for every plan, every year
- All of our work is reviewed
- Each of our consultants holds ASPPA credentials and attends annual training
- Our consultants have an average of 20 years in the industry

## **We Do It Right**

- We design innovative plans that help you avoid taxes while saving for retirement
- We perform the same audit checks as the Internal Revenue Service and Department of Labor so that if the plan is audited, we've already addressed the issues
- We pass back all revenue sharing to offset plan fees
- We return phone calls and e-mails within 24 hours
- We treat our employees well so that they stay long-term and understand the needs of their clients
- If we're not the right fit for you now, we'll let you know. Sometimes companies don't need our services at this time and we'll recommend what is best for you now



Noble-Davis Consulting, Inc.  
6190 Cochran Road • Suite D • Solon, Ohio 44139  
(440) 498-8408 • Toll-Free (888) 657-0702 • [NobleDavis.com](http://NobleDavis.com)

# SIMPLE



We are independent and can work with any advisor, accountant, platform, custodian or investment company. We work with you and your advisor to listen to your needs and create the best plan for you. We are well known for being problem solvers and finding innovative ways to tackle challenging issues. We wrap ourselves around your needs and take pride in our services.

## **We Make It Easy**

- You will have a dedicated consultant that knows your plan and your needs
- We have an easy online year end data collection process
- We determine who is eligible, calculate the contribution, prepare signature ready forms and distribute the required notices directly to the plan participants
- We automatically send distribution paperwork to terminated participants
- We regularly force out terminated participants under the dollar threshold
- Distributions and loans are approved via a simple e-mail

## **We Are Friendly and Communicative**

- We constantly monitor and suggest changes that could improve your plan
- We take the time to explain complex laws in simple language
- We hold your hand
- We make suggestions on how to lower your fees



Noble-Davis Consulting, Inc.  
6190 Cochran Road • Suite D • Solon, Ohio 44139  
(440) 498-8408 • Toll-Free (888) 657-0702 • NobleDavis.com

# WORRY-FREE



Our mission is to provide you with Peace of Mind for all aspects of your retirement plan. We strive to exceed your expectations in service while making sure we get every detail correct. Let us help you find the perfect plan design and introduce you to a world of worry-free administration.

## **We Make It Worry-Free**

- We keep up on current law and automatically amend your plan when needed
- We follow up with you to make sure we get your information and everything is timely
- Our fees are transparent and provide great value
- We look at your plan yearly and give you advice on any changes that would benefit you and your plan
- If we make a mistake, we'll tell you and fix it at our expense

***It all adds up to Peace of Mind***



Noble-Davis Consulting, Inc.  
6190 Cochran Road • Suite D • Solon, Ohio 44139  
(440) 498-8408 • Toll-Free (888) 657-0702 • [NobleDavis.com](http://NobleDavis.com)