

A State-of-the-Art Platform for the full spectrum of Retirement Plans

PCS pioneered the open architecture approach to providing a comprehensive retirement plan. Now, we're revolutionizing the technology behind it.

Real testimonials from real clients:

“ This is great! PCS is one of the only recordkeepers who is doing this for their clients ... You made it easy.

TPA, AL

We are very appreciative of your work ... The other providers we work with either placed the onus entirely on our client or only covered their own fees – you did it all! These disclosures are the best we have seen so far. Thank you to everyone who has been involved.

Advisor, NJ

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Learn why the future of Recordkeeping is already here.

There's a reason PCS was ranked as one of the fastest growing companies in America by Inc. 5000. Beyond our unwavering commitment to excellent customer service, we are also driven to offer the most advanced platform in the industry. Our AccountLink System incorporates robust technology that makes your job easier, like streamlined payroll processing, detailed plan and participant views, 3rd party software integration, automated funding requests, and on-demand reporting. Its all a part of our commitment to our clients, and the promise of delivering The Next Generation Retirement Plan™.

Plan Types

PCS offers an array of plan types and arrangements. They include:

- 401(k) Plans
- 403(b) Plans
- 457(b) & (f) Plans
- Profit Sharing Arrangements
- Non-Qualified Retirement Plans
- IRA Plans
- Solo(k) Plans
- And more



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Our **cutting-edge technology** allows clients to spend less time administering the plan, and more time managing their business.

At Professional Capital Services (PCS), you get more than excellent customer service. You're given access to an abundance of tools and functionality that makes maintaining and monitoring a retirement plan easy. We pride ourselves on leveraging technology to constantly improve and perfect the way a plan is managed.

State-of-the-Art Daily Valuation

PCS offers comprehensive up-to-date information on asset values and an array of advanced platform features. Daily Valuation features include:

- Daily Valuation of Participant Accounts by Source & Fund
- Online Distributions and Paperless Loan Capabilities
- Daily Processing & Reconciliation of Account Activity
- Calculation of Minimum Required Distributions
- Real-Time Vesting Service Computation

Streamlined Payroll Submission

Our PaySnap system integrates with these 3rd party payroll providers:



Automated Funding Request (AFR)

Our automated funding request process:

- Prevents Issues
- Confirms Data Receipt
- Validates Data
- Indicates Total Funding for ACH
- Helps manage future contributions/loans

Featured Functionality

On-line and On-Demand Availability of Plan-Level Reports

The ability to run, view and print reports on-line.

Plan-Level Transaction History

The ability to view plan-level transaction history by date range, by fund and transaction type.

Participant View

The access to view a participant's account, including all of the options and data available to the participant, participant-level investment detail and transaction history.

Census Validation & Online Enrollment

We offer the ability to validate census information online via our secure website. Plus, the ability to enroll new participants at the Plan Sponsor, as well as the Participant level.



PCS is CEFEX certified as adhering to ASPPA's Standard of Practice for Retirement Plan Service Providers.

Roland|Criss has also awarded PCS with "AAA" rating for its Superior Quality Management System.