



Commerce Trust Supplemental Retirement Plan Services

Helping Your Members Make the Most of the Future

Commerce Trust has a long history of providing a range of services to meet the needs of supplemental retirement plan providers.

Unlike other retirement plan providers who want your needs to fit around their services, we tailor retirement plan programs to meet your unique needs. A dedicated Relationship Manager assembles a team of certified Retirement Plan Specialists and Investment Managers who work with you one-on-one to mold every aspect of a plan to your union's size, structure, funding abilities and budget. We offer a wide variety of separate account investment strategies through Commerce Capital Advisors, and have a carefully selected group of high-quality, "brand name" mutual funds for member-directed plans.

We are known for our high-quality educational programs for retirement plan participants, programs that play a critical role in achieving higher participation rates. Drawing on the same knowledge and expertise that we use to design and implement 403(b) and 401(K) plans, we bolster your members' understanding of benefits and show them how to make the most of the opportunities.

In addition to investment education programs, we partner with third-party administrators to provide supplemental retirement plan services. *(Please see back page for a list of our services.)*











*Retirement
Plan Services*



The Commerce Trust Company
A division of Commerce Bank, N.A.

Our supplemental retirement plan services feature:

-  — Experienced specialists certified in qualified plan design
-  — State-of-the-art technology that allows for daily valuation, online reporting and transactions via the Internet or telephone
-  — Responsive local service teams to interact with you and your participants
-  — Comprehensive administration
-  — Access to world-class investment products from around the globe — including in-house bond expertise as well as external managers
-  — Guidance in selecting recordkeeping solutions
-  — Reliable custody of plan assets
-  — Complete plan administration (loan administration, tax reporting and compliance testing) by highly trained specialists

Locations

ILLINOIS
Belleville
Bloomington
Peoria

KANSAS
Leawood
Wichita

MISSOURI
Kansas City
Springfield
St. Joseph
St. Louis



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