

Trust fund administration services



Serving more than:

50,000

Plan members



UMR has a strong understanding of the unique cultural values and strong service needs of labor organizations.



Since 1958

We have been administering Taft-Hartley and labor and trust plans and continue to service many of our original clients.



Health and
Welfare Funds



Defined
Contribution
Plans



Defined
Benefit Plans



Other plans (RESA,
Vacation and
Education funds)

Health and Welfare Trust Services

- Eligibility hour and dollar banking services
- Contribution collection and delinquency services
- Plan notice and ERISA disclosures preparation and distribution
- Reciprocity administration
- COBRA administration
- Accrual basis financial statement preparation
- Cash management
- Annual audit support



Additional trust fund administration services for pension, annuity, vacation, apprenticeship and education funds:

- Defined benefit and defined contribution pension plan administration
- Contribution collection and delinquency services
- Reciprocity administration
- Plan notice and ERISA disclosures preparation and distribution
- Preparation and mailing of participant benefit statements
- Accrual basis financial statement preparation
- Cash management
- Annual audit support
- Issue and distribute checks
- Preparation and distribution of trust meeting agenda and minutes

