



You'll love this bundled 401(k) solution.

As a fully-bundled provider, 401GO simplifies all aspects of 401(k) plan management, including administration, recordkeeping and asset custody. Our proven automation technology is paired with industry-leading live customer support for the ultimate tech + touch solution.

✓ Plan Design & Setup

- Same-day setup
- Safe Harbor plans
- Auto-enrollment
- Roth + traditional
- Multiple eligibility options

✓ Administration

- Payroll integration
- Recordkeeping & reporting
- Eligibility tracking & notifications
- 3(16) administration
- Easy employee onboarding

✓ Compliance

- Automated testing
- Fidelity bond included (Plus and Premier)
- Forms 5500, 1099-R, 8955-SA
- IRS and DOL filings
- Summary annual report

✓ Premium Support

- Dedicated relationship manager
- Live support for employees
- Payroll setup assistance
- Financial wellness tools
- Chat, email or phone support options

✓ Investments

- 3(38) services available
- Broad selection of funds
- Dynamic rebalancing
- No 12b-1 fees or commissions
- Guided portfolio builder

