



Let's make plans.

A MODERN RETIREMENT SOLUTION FOR A BETTER CLIENT EXPERIENCE.

401GO has truly unique technology. Our proprietary system was built from scratch, and is designed to be highly automated, streamlined and nimble. Unlike others who digitize ancient processes, our founders questioned every step and found innovative ways to make retirement plans practical for businesses of all sizes.

The result is a platform that is **radically different**.

15-minute setup

Your clients can complete a new plan setup in as little as 15 minutes! Or, you can perform the setup on their behalf.

Since most small businesses have similar needs, our automated setup makes assumptions to streamline the setup process and suggest the best plan design.

Assumptions can be checked or changed later, so businesses are never forced into one plan design.

You'll answer questions in three areas:

- ✓ company questions
- ✓ plan questions
- ✓ employee questions

Fully-bundled and automated

Automation and service bundling create maximum efficiency, which allows you to better serve many smaller clients, and scale your book of business with ease.

We include 3(16) and 3(38) services, or allow you to serve as the 3(38) fiduciary if you prefer.

You'll answer questions in three areas:

- ✓ payroll integration
- ✓ automated notifications
- ✓ eligibility tracking

Effective tools for advisors.

OUR PARTNER PORTAL WORKS AS HARD AS YOU.

✓ Monitor progress.

See how well your plans are performing, and request access to participant accounts.

✓ Build in your advisory fees.

Create custom pricing tiers and your fees will be built in to the cost of the plan.

✓ Download proposals.

Our proposal builder lets you make the quotes you need for your clients anytime.

✓ Integrate with your TAMP.

Our platform integrates with trusted tools to help you monitor your plans.



✓ Get lots of reports.

Get almost any report you could ever need. Our improved overviews are perfect for annual reviews.

Bring your value.

DISCOVER OUR OUTSIDE 3(38) OPTION

You will have access to every fund offered by our custodial partner, Matrix Trust. You'll be able to build an effective lineup and as many models as you need right inside your advisor portal.

If you prefer not to serve as an investment fiduciary, a robust 401GO investment lineup is always available for use.





Practical Pricing.

401GO was designed for efficiency to make it affordable for small businesses while providing the power and flexibility that more complex organizations demand.

GO-Plus

\$125
per month

\$7 per participant
0.15% AUM fee

Our most popular
option, designed to
work for most
businesses.

GO-Starter

\$25 per month

\$2 per
participant
0.3% AUM fee

GO-Solo

\$19 per month

0.3% AUM fee
\$250 setup fee

1-25 participants	\$7
26-50 participants	\$6
51-100 participants	\$5
101-150 participants	\$4
151-200 participants	\$3
200+ participants	\$2



"The customer service was excellent from the first conversation all the way through the transition."

-Dr. Mark Kleive



"The setup process was easy, and someone was readily available if I had any questions."

-Jacie G.

We automate everything but
relationships.



No one wants customer service from a robot.

We offer live support from real humans for all participants, and a dedicated relationship manager for employers and advisor partners. Our customer service is our top-rated feature!

