

Find a Plan That Fits Your Needs

EXPLORE PRACTICAL RETIREMENT SOLUTIONS

	RETIRE GO-Plus Best for most businesses	RETIRE GO-Starter Best for businesses meeting state mandates who may upgrade later	RETIRE GO-Solo Best for solo business owners + their spouse (limit one business owner)
2025 Employee Contribution Limit	\$23,500	\$7,000	\$23,500
Flexible Plan Design	✓	N/A	✓
Multiple EIN Support	✓**	✗	N/A
Employer Contributions	✓*	N/A	✓*
Real-Time Data Exchange Through 360 API Integration	✓	✓	✓
Open Architecture With 10K+ Funds	✓	✗	✓
Dedicated Relationship Manager	✓	✗	✗
3(16) Fiduciary Services	✓	✓	✓
3(38) Investment Fiduciary Available	✓	✓	✓
Form 5500 Signed & Filed	✓	✓	✓***
Financial Advisor-Friendly	✓	✗	✓
Mobile App for iOS/Android	✓	✓	✓
Federal Tax Credits Available	✓	✓	N/A
Form 8881 Completed on Client's Behalf	✓	✓	N/A
Profit Sharing	✓*	N/A	✓*
Cash Balance Plans	✓**	N/A	N/A
Financial Wellness Tools	✓	✓	✓

*Discretionary **Additional fees may apply ***Available when assets are ≥\$250k in AUM