Retire
powered by 401GO

Heartland

Let's make plans.

A MODERN RETIREMENT SOLUTION FOR A BETTER CLIENT EXPERIENCE

Introducing the modern, automated 401(k) platform built to simplify plan management and scale your business. With fast plan setup, hands-off administration, and intuitive dashboards, this solution lets you focus on client relationships while we handle the heavy lifting.

Automation makes plan administration easy.

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

You'll love our simplified administration:

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

Effective Tools for Advisors

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

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

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

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

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

Matrix Trust Company · Fi360 · Orion · RPAG · Envestnet · eMoney · LPL Financial · Fiduciary Focus Toolkit · Advyzon

Bring your value.

DISCOVER OUR OUTSIDE 3(38) OPTION

Build your lineup.
You will have access to every fund offered by our custodial partner, Matrix Trust.

Create models.
Create as many models as you require to meet your clients' needs.

If you prefer not to serve as an investment fiduciary, a robust 401GO investment lineup is available for use, or you can utilize one of our 3rd party 3(38) partners.

Pricing from Another Decade

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

- ✓ Financial wellness tools included with every plan.
- ✓ Preferred partner pricing helps you save even more for your clients.

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
Spouse account included

TIERED PARTICIPANT PRICING

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

We automate everything but relationships.

No one wants customer service from a robot. When you need help, we'll be here. The 401GO team of highly-trained and U.S.-based live agents is available by phone, email or chat.

401GO ★★★★★ 4.8 STAR RATING