401GO

Let's make plans.

MODERN RETIREMENT SOLUTIONS FOR BETTER CLIENT EXPERIENCE

401GO offers a proprietary system, built from scratch, that makes retirement planning highly automated, streamlined, and nimble. While other providers merely digitize outdated processes, our founders identified and built innovative solutions that make retirement plans accessible and practical for businesses of all sizes.

From start to finish, the experience 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.

Because most small businesses have similar needs, automated setup will make assumptions that streamline the setup process and suggest the best plan design.

Assumptions can be reviewed or altered to ensure businesses are never forced into a suggested plan design.

You'll answer questions in three focus areas:

- Company Information
- Plan Preferences
- Employee Data

Fully-Bundled and Automated

Automation and service bundling create maximum efficiency, so you can better serve many clients, and scale your book of business with ease.

3(16) and 3(38) fiduciary services are available, or you can serve as the 3(38) fiduciary, if you prefer.

401GO can also refer you to an outside investment advisor that specializes in 3(38) services.

You'll answer questions in three focus areas:

- Payroll Integration
- Automated Notifications
- Eligibility Tracking

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Modern tools for today's advisor.

MANAGE ALL OF YOUR PLANS IN ONE PLACE

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.

Use the proposal builder to create the quotes you need for your clients.

Access dynamic reporting.

Get almost any report you can imagine. Our improved overviews are perfect for annual reviews.

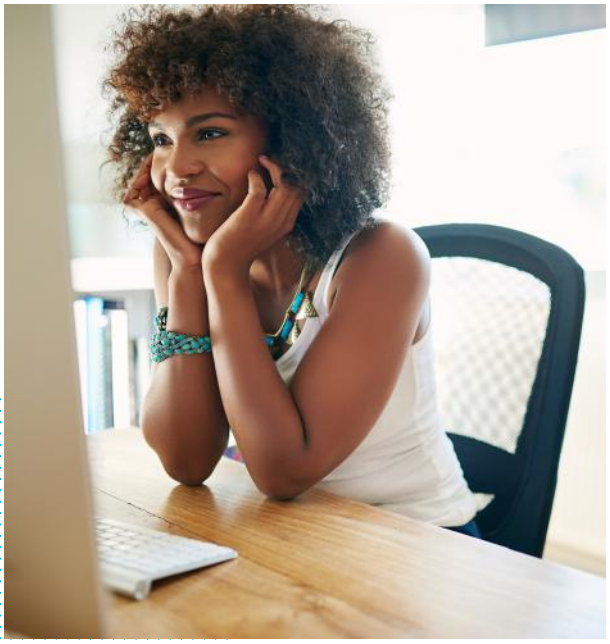
Integrate with your TAMP.

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

Matrix TRUST COMPANY | Fi360 | ORION | eMoney | ENVESTNET | RPAG

Deliver more value.

OUTSIDE 3(38) OPTIONS AVAILABLE



With 401GO, you 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.

Or, take advantage of our 3(38) partners, and include expert investment fiduciary support with your plans.

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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!

NAPA
Top Recordkeeper
2022, 2023, 2024

CBINSIGHTS Fintech 100 2024

SUMMER 2025 Best Support

SUMMER 2025 High Performer

SUMMER 2025 Easiest Setup

SUMMER 2025 Easiest Admin

SUMMER 2025 Fastest Implementation

4.8 STAR RATING