401GO

We're better together.

FRICTION-FREE SOLUTIONS FOR YOUR CLIENTS

Our modern, automated retirement platform was built to simplify plan management. You can focus on client relationships while we handle the heavy lifting.

Offer the best solutions to your clients.

Using proprietary automation technology and service bundling, we've created a reliable and modern platform that's easy to use.

- 15-minute setup process
- Full 3(16) admin services
- Payroll integrations for all

Use our valuable advisor portal.

We've prioritized creating a portal that works for advisors. From here you can start, manage and report on all your 401GO plans.

- Build in your advisory fees
- Make proposals and set up plans
- Customize your reports

In-house or outside 3(38) options available.

Serve as the investment fiduciary yourself or use our robust in-house 3(38) lineup. You can easily manage these options inside the partner portal.

- Build your lineup
- Access every fund in Matrix Trust
- Create as many models as needed

We automate everything but relationships.

No one wants customer service from a robot. If you need help, a team of live agents is available by phone, email or chat.

4.8 STAR RATING

SUMMER 2025 Best Support

SUMMER 2025 High Performer

National Association of Plan Advisors

Top Recordkeeper

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