

Your one-stop retirement shop.

A SOLUTION THAT IS BEYOND BUNDLED



401GO delivers end-to-end ownership of your 401(k)—so there are fewer handoffs, less complexity, and a smoother experience for you and your employees. Our integrated approach brings recordkeeping, administration, compliance, and investment management together in one platform.

Why choose a provider with end-to-end ownership over a multi-vendor approach?



Cost Efficiency

Reduce handoffs to help keep pricing competitive—and limit surprise fees.



Lower Administrative Burden

Keep compliance, reporting, and fiduciary support in one place—reducing workload and risk.



One Point of Contact

Work with one team for faster, clearer service.



Faster Problem Resolution

Resolve issues faster with one provider accountable end-to-end.



Better Employee Experience

Give employees one platform for enrollment, accounts, and planning.

End-to-end ownership helps you avoid:

- “Who owns this issue?” finger-pointing between vendors
- Delays due to handoffs and ticket ping-pong between vendors
- Multiple logins and inconsistent reporting
- Surprise add-on fees for “extras”
- Last-minute compliance work falling on HR at the worst times

401GO gives you everything your plan needs, managed in one integrated platform.

Recordkeeping

- Maintain records for participants
- Receive and track contributions
- Provide reporting
- Perform plan setup and participant account setup
- Provide system for loans, distributions, and rollovers

Administration

- Provide required notices and approved documents
- Receive loan and distribution requests
- Perform required plan testing
- Prepare tax forms (form 5500)
- Calculate profit-sharing and year-end contributions

Asset Custody

- Provide access to a diverse selection of investments
- Execute trades
- Investment rebalancing
- 1099 services
- Maintain security of assets

Fiduciary services included.

Our built-in 3(16) administration services help keep your plan running smoothly and aligned with ERISA requirements.

Our 3(38) investment fiduciary services provide a strong, monitored lineup of funds. We also support outside 3(38) fiduciaries.

With 401GO, you get:

- ✓ **A single platform** for the full plan experience
- ✓ **One team** accountable end-to-end
- ✓ **Clear pricing** with fewer surprises
- ✓ **Compliance support** built in
- ✓ **An easier employee experience** from enrollment to retirement

Ready for a simpler 401(k) experience?

See how a vertically integrated platform can reduce handoffs, lighten admin work and improve the participant experience.

Schedule a demo call with 401GO.

