401GO

Effective tools for advisors.

PLAN MANAGEMENT IS EASIER THAN EVER

We've built a powerful, intuitive portal designed specifically for financial advisors. From setup to oversight, you'll have everything you need to deliver exceptional value to your clients—quickly, efficiently, and profitably.

Streamline plan setup.

- **Client self-setup**
  Invite clients to start a plan using your custom link, or handle setup on their behalf—your choice.
- **Advisor plan setup**
  Launch and manage advisor-branded plans directly, giving you complete control from day one.

Manage and monitor with ease.

- **Monitor progress.**
  Track plan performance, review participation data, and request participant access anytime.
- **Upload documents.**
  Upload, organize, and share essential client and plan documents securely in one place.
- **Set your notifications.**
  Stay in the know with alerts for plan updates, new features, newsletters and education.
- **Create fund lineups and models.**
  If you serve as a 3(38) fiduciary, easily design your lineup and custom investment models.
- **Integrate with trusted tools.**
  Connect seamlessly with eMoney, Orion, Matrix, Envestnet, Fi360 and more. Access our Pontera connection to support participant accounts.

Grow your practice.

- **Download proposals.**
  Build and download custom plan proposals anytime with our flexible proposal generator.
- **Get reports.**
  Access a variety of detailed reports ideal for client reviews and plan audits.
- **Build in your advisory fees.**
  Create custom pricing tiers — including flat fees and banded AUM — and embed your fees directly into plan costs.

Want to know more?

Ask us for a demo of our advisor partner portal and see how 401GO can make plan management effortless.