401GO

Modern retirement partnerships.

HELP YOUR CLIENTS WIN

Advisors today are expected to do more than recommend investments. They're responsible for plan setup, payroll accuracy, compliance support, participant experience, and ongoing oversight—often across dozens or hundreds of plans.

401GO was built to make that responsibility manageable. By simplifying operations and increasing visibility across the entire plan lifecycle, advisors gain the clarity, control, and consistency they need to serve clients confidently and scale sustainably.

Eliminate manual work.

401GO's automated workflows replace many manual tasks—freeing up time for higher-value client work.

Deliver consistent client experiences.

Standardized processes and centralized data create cleaner onboarding, smoother administration, and more professional interactions.

Scale without adding complexity.

Serve more plans and participants without increasing operational burden or relying on disconnected systems.

401GO is radically different.

Traditional bundled 401(k) platforms rely on a patchwork of external systems—recordkeeping, compliance, payroll connectors, and support teams stitched together behind the scenes. When those systems don't communicate, advisors feel the consequences.

401GO is vertically integrated.

We own and operate a single, end-to-end 401(k) technology platform—bringing recordkeeping, compliance, payroll sync, automation, notifications, and participant experience into one unified system.

- Fewer data breakpoints and errors
- Faster issue resolution without third party dependencies
- Consistent information across user experiences
- Predictable, reliable outcomes for advisors and their clients

Built to support advisors' work.

Launch plans faster, with confidence.

Enjoy faster onboarding without sacrificing plan quality or professional consistence.

- Create and download proposals
- Set up plans in 15 minutes or less
- Retain full flexibility of plan design
- Select billing structures and investment lineups directly within the platform

Centralize documents and agreements.

We provide a more streamlined workflow with fewer errors, for a polished client experience.

- Upload and manage your own documents and client agreements
- Control when docs are included
- Track completion and signatures
- Store docs securely within the platform

Deliver more value.

Serve in the highest capacity you can on behalf of your clients. At 401GO, you have options.

- Build effective fund lineups and models inside your advisor portal, or use our included investment lineup
- Customize notifications for yourself and set defaults for plans
- Integrate with your trusted tools for additional insights and monitoring

Streamline invoicing.

We provide a more streamlined workflow with fewer errors, for a polished client experience.

- Create flexible billing structures and add them to your plans
- Get paid easily with automatic deposits
- Remove friction from client payment conversations

401GO

A better employee experience.

A platform employees actually use.

A retirement plan only works when employees engage with it. 401GO delivers a simple, modern participant experience that helps employees take action and stay on track—without needing extra support from HR.

Approachable portfolio building.

Investing can feel intimidating. 401GO helps employees build a portfolio that aligns with their goals and risk comfort using an optional guided experience that takes just minutes.

Financial wellness adds everyday value.

Employees don't think about retirement only once a year, they think about money all the time.

401Goals™ financial wellness tools help make the plan more relevant between paychecks.

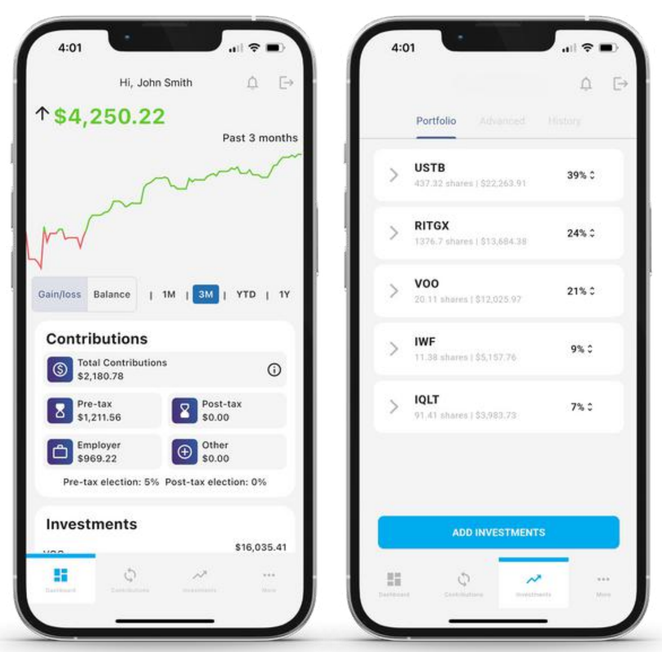
Simple management with a mobile app.

Today's employees expect to manage important financial decisions from their phone. The 401GO mobile app makes it easy to enroll, check progress, and take action in just a few taps.

Enjoy fiduciary flexibility.

401GO gives advisors multiple ways to deliver investments, so you can align every plan to your investment philosophy, fiduciary role, and client needs.

- Build your own lineups and models and provide 3(38) services to your clients.
- Use our robust, built-in lineup and take the responsibility off your shoulders.
- Use a 3rd party partner that specializes in investment services.



401GO.COM | 888.5300.401 | hello@401go.com

Practical pricing.

Pricing is practical for small businesses.

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

GO-Plus	GO-Starter	GO-Solo
$125 per month	**$25** per month	**$19** per month
$7 per participant 0.15% AUM fee $500 setup fee	$2 per participant 0.3% AUM fee	$2 per participant 0.15% AUM fee $250 setup fee

Volume discounts apply. Custom pricing available based on plan size.

"They immediately know who their assigned service representative is. It gives a little bit more personalization."

-Rob Edwards, Financial Integrators

“"I email a question, and I know I'll have a detailed response within 24 hours. That level of support is rare in this industry."

-Timothy Green, Green Retirement

Talk to our sales team to discover how 401GO can benefit your practice.

We automate everything but relationships.

★★★★★

401GO provides industry-leading, live support to you, your clients and participants.