



Make the switch.

MOVING TO 401GO IS EASY



At 401GO, we make plan transfers easy. Our streamlined process ensures your move from another provider is simple and worry-free for both you and your employees.

PHASE 1: Establish the Plan with 401GO

Plan sponsors will start by submitting the existing adoption agreement. A due diligence review will be performed and protected benefits will be identified.

401GO will reach out to verify plan details for accuracy. Once complete, you will sign the new plan documents.

- ✓ Review and sign new plan documents
- ✓ Receive support assignments
 - A client success manager will be your main point of contact
 - An implementation specialist will support the plan transfer process

Congratulations!

Once the assets have been transferred to 401GO, allocated to participant accounts and re-invested in the market, the process is complete.

Encourage your employees to set up their accounts and download the 401GO mobile app, so they can begin managing their retirement savings.

PHASE 2: Transfer funds from the Prior Provider

The prior provider will set the timeline for the asset transfer, which is typically 45-60 days. During this period, participants will lose access to existing funds, but they will be able to establish new accounts with 401GO and begin contributing for a seamless experience.

- ✓ Establish integration with your payroll provider
- ✓ The integration provides employee census data
- ✓ Notifications are sent to employees automatically
- ✓ Employees can set up accounts and begin contributing



Get the 401GO mobile app.

