

# Practical pricing.

**PLANS THAT MAKE FINANCIAL SENSE**



## GO-Plus

401(k) and 403(b) plans

**\$125/mo**

\$2 - \$7 per participant

\$500 setup fee

0.15% AUM fee

- Flexible plan design
- True360™ payroll integration
- Dedicated relationship manager
- ERISA bond included
- 3(16) administration services included
- 3(38) investment fiduciary (OR)
- Optional outside 3(38) fiduciary
- Open investment window
- Tax credits available
- Profit sharing calculations\*
- Controlled groups\*
- Cash balance plans\*

\*Additional fees may apply.

## GO-Solo

Solo 401(k) plans

**\$19/mo**

\$250 setup fee  
0.15% AUM fee

## GO-PEP

Group 401(k) plans

**\$139/mo**

\$7 per participant  
0.2% - 0.4% AUM fee

## Cash Balance

Defined benefit plans

**\$3500**

per year  
0.15% AUM fee

|                     |     |                      |     |
|---------------------|-----|----------------------|-----|
| 1-25 participants   | \$7 | 101-150 participants | \$4 |
| 26-50 participants  | \$6 | 151-200 participants | \$3 |
| 51-100 participants | \$5 | 200+ participants    | \$2 |

New comparability profit sharing calculations = \$199

Controlled groups = additional EINs are \$30 each.