



PlanDirect

Our Commitment

PlanDirect was designed with the small business owner, one with fewer than 10 eligible employees, in mind. You receive full-service retirement plan administration bundled with a single fund family at a great price.

PlanDirect is a 401(k) program designed for employers that want to increase benefits to their employees and attract new employees.

You may only select one fund family as the funding vehicle for your **PlanDirect** retirement program. Please consult a Marketing Specialist with Dyatech at 866-651-4222, ext. 500 or visit our website at www.dyatech.com for the underlying fund options available within each fund family below.

PlanSolo	PlanDirect	PlanExpress	PlanSelect	Payroll Services
	<p>Features</p> <ul style="list-style-type: none"> Financial Advisor Support Live Support Reps 15 Investment Options Daily Valuation Quarterly Statements Prototype Plan Documents Plan Design Toll Free 800 Access Compliance Testing Form 5500 10 or Fewer Employees No Conversion Charge No Installation Charge Roth Profit Sharing Options Safe Harbor Options Enrollment Materials Internet Access 24/7 	<p>Pick a Family</p> <p>PlanDirect allows the selection of 15 fund options from 1 Fund Family.</p> <ul style="list-style-type: none"> <input type="checkbox"/> AIM <input type="checkbox"/> Alliance Bernstein <input type="checkbox"/> American Funds <input type="checkbox"/> Columbia <input type="checkbox"/> Davis <input type="checkbox"/> Delaware <input type="checkbox"/> Eaton Vance <input type="checkbox"/> First American <input type="checkbox"/> Federated <input type="checkbox"/> Franklin Templeton <input type="checkbox"/> Hartford <input type="checkbox"/> ING <input type="checkbox"/> John Hancock <input type="checkbox"/> Lord Abbett <input type="checkbox"/> Oppenheimer <input type="checkbox"/> Pioneer 		<p>\$500</p> <p>This includes 12 months of service from the effective date of the Dyatech service agreement.</p> <p>Annual Recordkeeping Fee is billed annually in advance.</p> <p>Processing Fees: The fees listed below are deducted from the employee's check proceeds.</p> <p>\$50 – Distribution \$125 – Loan Processing</p>