



PlanExpress

Our Commitment

PlanExpress was designed with the small business owner, one with fewer than 25 eligible employees, in mind. You receive full-service retirement plan administration bundled with the ease of an open architecture fund platform at a great price.

PlanExpress is also our promise to you:

1. New Plans – Dyatech will setup your retirement plan and have it fully functional within one week of receiving the enrollment material.
2. Existing Plans – Dyatech will commit to having your retirement plan setup and fully functional within one week of receiving the enrollment material. However, the existing assets of your plan will be processed based on timelines set forth by the prior recordkeeper.

PlanExpress allows you access to great fund families with proven track records, giving your employees the opportunity to allocate their assets in a diverse manner.

AIM	Davis	First American	John Hancock
AllianceBernstein	Delaware	Franklin Templeton	Lord Abbett
American Funds	Eaton Vance	Hartford	Oppenheimer
Columbia	Federated	ING	Pioneer

Fee for 12 months of service

\$1,000

Full Service Support	Prototype Plan Documents	Enrollment Material
Financial Advisor Support	No Conversion or Installation Fee	Internet Access 24/7
Payroll Data Submission	Live Support Reps.	Toll Free 800 Access
15 Investment Options	Safe Harbor Options	Compliance Testing
Daily Valuation	25 or fewer employees	Form 5500
Roth	Plan Design	Plan is Self-Trustee
Quarterly Participant Statements	16 Fund Families	Profit Sharing Options

Annual Recordkeeping Fee billed annually in advance.

Processing Fees (Charged to participants)

Loan Fee – \$125 Check Fee – \$55