



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.

Table listing fund families: AIM, AllianceBernstein, American Funds, Columbia, Davis, Delaware, Eaton Vance, Federated, First American, Franklin Templeton, Hartford, ING, John Hancock, Lord Abbett, Oppenheimer, Pioneer.

Fee for 12 months of service

\$1,000

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

Annual Recordkeeping Fee billed annually in advance.

Processing Fees (Charged to participants)

Loan Fee – \$125 Check Fee – \$50