



PlanSelect

Our Commitment

PlanSelect was designed for a specialized market segment, businesses with 26 to 99 eligible employees. You receive full-service retirement plan administration bundled with the ease of an open architecture fund platform at a great price.

PlanSelect 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

\$1,500

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	26 to 99 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 – \$50