



PlanSolo

PlanSolo... Your solution for owner-only retirement plans.

PlanSolo was designed specifically for the business owner with no employees other than a spouse. With PlanSolo, you receive full-service retirement plan administration bundled with the ease of an open architecture fund platform at a great price. If you are a business owner who is looking to **maximize your tax savings** through a **flexible** and **inexpensive** retirement plan, PlanSolo is the solution for you.

PlanSolo features include:

401(k) and Profit Sharing Contributions
Full Loan Privileges
All Contributions Immediately Vested
Easy Distribution Options

No Service Requirements
Fast and Simple Plan Setup
Flexible Investment Options
Maximum Annual Contributions

Fund Options

In addition to the simplicity and convenience of a 401(k) plan, **PlanSolo** allows you access to great fund families with proven track records, giving you the opportunity to allocate your assets in a diverse manner.

AIM
AllianceBernstein
American Funds
Columbia

Davis
Delaware
Eaton Vance
First American

Franklin Templeton
Hartford
ING
John Hancock

Lord Abbett
Oppenheimer
Pioneer

One-Time Setup Fee
Fee for 12 months of service

\$75
\$250

With **PlanSolo**, you receive full-service plan administration and high-quality customer support for a one-time setup fee and one of the lowest annual recordkeeping fees available. Annual Recordkeeping Fee billed annually in advance.

Full Service Support
Financial Advisor Support
Payroll Data Submission
15 Investment Options

Daily Valuation
Roth
Quarterly Statements
Compliance Testing

Prototype Plan Documents
Enrollment Material
Internet Access 24/7
Toll Free 800 Access

Form 5500
Plan is Self-Trustee
Conversion / Startup
Profit Sharing Options

Processing Fees

Loan Fee – \$125

Check Fee – \$55