



## 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*

**\$250**

### *Fee for 12 months of service*

**\$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**

(Charged to participants)

Loan Fee – \$125

Check Fee – \$50