

One Page Fact Sheet



ePlan

ePlan was designed for a startup or new 401k plan that is looking for a robust online operating system and an open architecture investment platform at a great price. This program is a self service product that allows a company to have a state of the art retirement plan.

ePlan gives an enormous amount of control to the Plan Sponsor with online tools and capabilities only seen at the highest product levels. Although the Plan Sponsor is able to operate their 401(k) program completely via the Internet, our experienced retirement professionals assist with training and advice every step of the way.

Annual Recordkeeping Fee & Services

Per person per year:

Customer Service Support
Financial Advisor Support
No Setup Fee
15 Investment Options
Census Data Submission
Enrollment Materials
Profit Sharing Option

Summary Plan Description
Payroll Data Submission
Required Employee Notices
Safe Harbor Options
Prototype Plan Document
Online Activity Summaries
Traditional Match Option

Roth
Internet Access 24/7
Toll Free 800 Access
Compliance Testing
Form 5500
Distribution Support
Online Reporting

\$15

The \$15 per person per year is automatically ACH drafted from the sponsoring company's checking account each month at a rate of \$1.25 per person per month.

Processing Fees: (Charged to participants)

Loan Fee – \$125

Check Fee - \$50

Investment Options

AIM
AllianceBernstein
American Funds

Federated
First American
Franklin

Hartford
John Hancock
Lord Abbett

Munder
Pioneer
Templeton