

# How We Make Offering Retirement Plans Easier

From high fees to poor customer service, it's no wonder small businesses are underserved by retirement plan service providers. So as we set out to create a modernized retirement platform, we made sure it challenged status quo and reimagined plans the way they were meant to be with:

## 1 HIGH TECH, HIGH TOUCH EXPERIENCE

Our API-driven recordkeeping platform allows us to perform activities faster with real-time visibility into issues for quick remediation. All the while, users are interfacing with an intuitive, modern portal that is easy to navigate and understand. When needed, our digital help center, paired with our dedicated customer success managers, provide support every step of the way.

## 2 EXTENSIVE PAYROLL INTEGRATIONS

One of the biggest pain points of plan administration is the payroll file submission process. Through integrations with dozens of leading payroll providers, information is automatically transmitted to save you time, mitigate errors, and provide a more seamless experience all around.

## 3 REASONABLE FEES DISCLOSED IN PLAIN ENGLISH

Fees can often be hard to find, with descriptions buried in dozens of pages of legalese. Not only are our fees typically below industry benchmarks, but we provide you with clear, transparent fee disclosures. This way, you know exactly how much you're paying and what you're getting in return.

## 4 COMPREHENSIVE PLAN ADMINISTRATION AND COMPLIANCE

We take the majority of administrative of work off your plate. Our services include a full suite of plan enrollment, eligibility, and payroll processing services as well as 3(16) fiduciary oversight including Form 5500s, year end testing, annual notice delivery, and more.

## 5 FLEXIBLE INVESTMENTS AND PLAN DESIGN

No two companies are exactly alike, so you deserve choice when it comes to your type of plan and investments. We give you the flexibility to build the right offering for your team, with or without the help of an advisor. And because we do not have our own investment products or engage in referral fees or revenue sharing, you are not beholden to proprietary offerings of any kind.