

Take a look at our side-by-side plan comparisons

Options401K

Plan Services	Option 1	Option 2	Option 3
EMPLOYER NEW PLAN FEDERAL TAX CREDITS UP TO \$16,500 OVER 3 YEARS	✓	✓	✓
RECORDKEEPING SERVICES	✓	✓	✓
PREPARE PLAN DOCUMENT, ANNUAL REPORTS, FORM 1099-R AND SIGN FORM 5500	✓	✓	✓
ANNUAL PLAN COMPLIANCE TESTING		✓	✓
EMPLOYER & EMPLOYEE ONBOARDING	✓	✓	✓
EMPLOYEE AUTO ENROLLMENT	✓	✓	✓
EMPLOYEE & EMPLOYER WEBSITE ACCESS	✓	✓	✓
EMPLOYEE INVESTMENT MANAGEMENT SERVICES	✓	✓	✓
3(16) PLAN ADMINISTRATIVE FIDUCIARY	✓	✓	✓
3(38) FIDUCIARY - INVESTMENT MANAGER	✓	✓	✓
VESTING SCHEDULE OPTIONS	✓	✓	✓
ASSIGNED ONBOARDING SPECIALISTS AND CLIENT MANAGERS	✓	✓	✓
SAFE HARBOR PLAN REQUIRED	✓		
TRADITIONAL PLAN DESIGN		✓	✓
REQUIRED FOR CURRENT PLAN ASSET ROLLOVERS			✓



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