



Leave the challenges of administering your retirement plan to us!



Saving you time and expense by maintaining your employee payroll data.



Reducing turnaround time for participant transactions such as loans and distributions.



Notifying employees of their eligibility, key plan amendments, and information to maintain employee plan communication.

Plan Pricing

Company Costs

Set-up (1x cost)	\$500
Plan Takeover (1x cost)	\$300 - \$500 (on complexity)
Monthly Fee:	
29 or less eligible	\$150 (incl. participant)
30 or more eligible	\$100 (plus participant)

Participant Costs

Monthly	\$2.50
Loan or Distribution fee (1x cost)	\$100

Asset Based Expenses

Avg. Mutual Fund Expense Ratio: 0.21%
TransAmerica Service Fee: 0.45%
Advisor Service Fee: 0.50%
DTSS Service Fee: 0.10%
Total Avg. Asset Based Fees: 1.26%

Average pricing for a 25 person company with approximately 1 million in plan assets is 1.27% as a percentage of plan Assets. Compared with a national average of 1.52% for the same sized stand alone plan. Averages based on 401(k) Averages Book 17th Edition ©2016 Pension Data Source, Inc.

Plan Investment Options

- TransAmerica
- PIMCO
- DFA
- Lord Abbett
- Vanguard
- Franklin Funds
- American Funds
- Janus
- BlackRock
- & many more

- Highly rated active and passively managed investments
- Daily NAV Valuation and Online access
- 0.21% average mutual fund expense ratio
- Online Performance and Prospectuses availability
- Participant Investment Advice
- Low Cost Target Date Funds

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