



### NATION WIDE:

- **1,400+** plans already on our platform
- **1,100+** advisors who can't stop selling
- Served by our national team of experts from coast to coast

### DIGITAL MEANS:

- So low-cost
- Sync with cloud-based payroll
- Pure data collection
- Touch free for client
- Advisor management portal
- An 'Invite your client' Online signup
- Smooth transition for existing plans
- Touch free annual administration
- Full compliance testing
- Touch fee Form 5500
- Digital fee proposal tool
- Digital service agreement
- Online payment system

### THE BOX

We offer fast, powerful 401ks at a low cost. Advisors connect the investments and the recordkeeper. 401kinabox removes the data and compliance hassle so all you're left with is a powerful retirement plan.

