



401KINABOX.COM

How Does It Work?

Opening a 401(k) plan with 401KinABox is easier than ever with our digital sign up.

We offer fast, powerful 401ks at a low cost. Advisors connect the investments and the recordkeeper 401KinABox removes the data and compliance hassle. Your client is left with is a powerful retirement plan.

In just 15 minutes, your client can open a new plan including an instant plan document to begin their 401(k) savings.

How do I Sign-Up?

- Navigate to www.401kinabox.com
- Create an Account
- Choose Plan Type
- Provide the Company Information
- Provide the Plan Information
- Enter Financial Advisor Info
- Accept Terms and Conditions
- Make a Payment
- Sign Plan Document

Try out our free SOLO 401(k) Calculator on our website to assist your client in realizing their maximum contribution.

If you would like assistance with setting up your new plan our support team is ready to help at 844-602-4015 and we can schedule a quick 15 minute appointment to guide you through the online process and answer any questions.

Solo 401(k)

- Start Up : \$299
- Annual: \$299
- Per Participant: \$0
- billed annually

Safe Harbor

- Start Up : \$650
- Annual: \$650
- Per Participant: \$12
- billed quarterly

401(k) Profit Sharing

- Start Up : \$950
- Annual: \$950
- Per Participant: \$24
- billed quarterly

Cash Balance

- Start Up : \$2,500
- Annual: \$2,500
- Per Participant: \$50
- billed quarterly