

The FREEDOM Plan



A flexible retirement plan solution for your business.

The FREEDOM Plan offers you the most **flexibility** in plan design and investment options allowing you to customize the retirement program to meet **your** company's needs.

Provide an easy to use, cost effective retirement plan program to your employees through advanced technologies, open architecture, full fee disclosure and enhanced customer service.

Plan Benefits

- Flexibility to choose the investments that best meet your employee's needs.
- Ability to lower overall plan costs and fulfill your fiduciary responsibility through full fee and revenue sharing disclosure.
- Easy to use, secure website allows for effortless plan administration.
- Quick and easy enrollment. In less than 5 minutes, employees can complete enrollment and begin saving for their future.
- Assurance that your participants get the best retirement education through advisor delivered education and communication.

Plan Features

Recordkeeping Services

- Daily Valuation/Record Keeping
- Custody and Trading
- 24 Hr Advisor/Plan Sponsor and Participant access
- Live Participant Call Center
- Quarterly award winning Participant SuperStatement™
- Quarterly Plan Sponsor Reports
- Dedicated Client Relationship Manager

Investment Services

- Complete open architecture
- Pre-screened fund options available
- Collective Investment Funds available
- Self Directed Accounts
- Revenue Sharing
- ETFs available

Administrative Services

- Customized Document
- Compliance Testing
- Form 5500 Preparation
- Summary Plan Description
- Enrollment Materials and Support

Providing Plan Sponsors with the highest degree of service, cutting-edge technology, comprehensive plan communication, creative plan solutions and inspired plan design for over 25 years.

SEAMLESS

401kDIRECT can provide a seamless solution to your company's retirement plan needs, using our bundled services or an administrator of your choice.

SERVICE

Our unending pursuit of excellence separates our organization and programs from others in the marketplace.

Allow us to provide you with extraordinary service and support.

VALUE

The rising costs of employee benefits are a concern of every business owner. We offer numerous options to help control your costs and ensure your getting the best value for your benefit dollar.

Contact us:

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Call today for a free plan fee analysis.

