THE Complete Suite OF SERVICES

The ShareBuilder 401k offers comprehensive retirement plans.

The services you receive are designed for your success in plan management.

Your Support Team & Set-up Tools

Services Built for You	How this Helps
Simple online plan installment	Get started quickly and efficiently
Experienced implementation specialists	Assists you with setup, rollout, and administration
Dedicated customer success manager	Ensures your current and future needs are met

Employee Online Tools, Education & Support

Services Built for You	How this Helps
Online enrollment & education	Simple tools to get your employees started
Online statements & account management	Know how your account is doing 24x7
Online research for investment selection	Select the investments that meet your goals
Diverse list of ETF Index Funds	Low expense ratio investments to help build your future
Traditional & Roth 401(k) options	Flexible options to help maximize your savings
Automatic rebalancing of assets	Maintains asset allocations with your goals
Online forms for beneficiaries, rollovers, etc…	Eliminates unnecessary paperwork
Access to loans from your 401(k) account	Makes loan management easy with interest paid back to you
Dedicated toll-free phone & email support	Customer care for you

On-demand Tools & Modules for You (Plan Sponsor)

Services Built for You	How this Helps
Online management of plan participants	Easily add, delete & manage participants
Automatic enrollment of your employees	Ensure employees start saving today
Online reporting, plan summary & transaction details	See where your plan is at any time
Simple payroll management	Easily manage contributions
Year-end checklist tool for taxes	Simplifies tax filings
Signature-ready Form 5500 for IRS reporting	Saves you time by preparing key documents automatically

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Securities and services are: Not FDIC insured • Not bank guaranteed • May lose value • Not a deposit • Not Insured by any Federal Government Agency