

# How We Make Offering Retirement Plans Easier

From high fees to poor customer service, it's no wonder small businesses are underserved by retirement plan service providers. So as we set out to offer a modernized retirement platform, we made sure it challenged the status quo and reimagined plans the way they were meant to be.

## 1 HIGH TECH EXPERIENCE

The Vestwell 401(k) platform is easy to navigate and understand. It's intuitive and modern so you can get the information you need, when you need it. Plus, our digital help center provides FAQs and walk-through videos to help you learn the ins and outs of your Vestwell portal. Our modern technology allows us to quickly identify and rectify issues, and our dedicated customer success managers are there to help guide you every step of the way.

## 2 360 PAYROLL INTEGRATION

One of the biggest pain points of plan administration is the payroll file submission process. Through payroll integrations, information is automatically transmitted to save you time, mitigate errors, and provide a more seamless experience all around.

## 3 AFFORDABLE FEES DISCLOSED IN PLAIN ENGLISH

Fees can often be hard to find, with descriptions buried in dozens of pages of legalese. Not only are Vestwell's fees below industry benchmarks, but we provide you with clear, transparent fee disclosures. This way, you know exactly how much you're paying and what you're getting in return.

## 4 FULL SERVICE PLAN ADMINISTRATION

We take the majority of administrative work off your plate. Our services include a full suite of plan enrollment, eligibility, and payroll processing services as well as 3(16) fiduciary oversight including Form 5500 filing, year end testing, annual notice delivery, and more.

## 5 FLEXIBLE INVESTMENTS AND PLAN DESIGN

No two companies are exactly alike, so you deserve choice when it comes to your type of plan and investments. We give you the flexibility to build the right offering for your employees.