

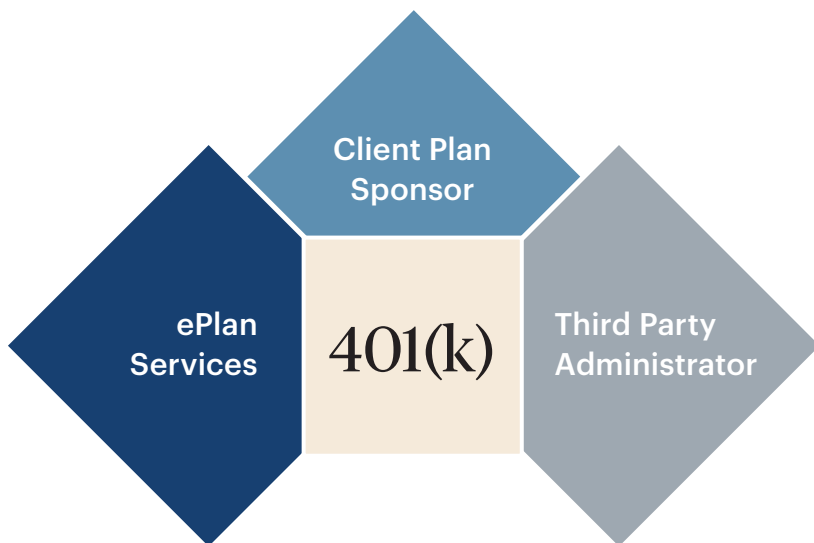
401(k) Recordkeeping for the Way You Do Business





Unique Needs Require Unique Solutions

401(k) solutions from ePlan Services combines the power and efficiency of the nation's top recordkeeping service* with fiduciary services from Mesirow, and Third Party Administrator (TPA) services, creating a robust solution to ensure your 401(k) plans run smoothly.



The Third Party Administrator will:

- Provide plan design consulting
- Maintain plan documents
- Calculate participant eligibility and vesting
- Prepare annual Form 5500
- Execute compliance testing
- Prepare profit-sharing allocations
- Verify loan and withdrawal requests

ePlan Services will:

- Offer access to long-term investment platform for retirement savings
- Keep track of plan assets, including data and monetary transfers
- Produce management reports and participant statements on a monthly and quarterly basis
- Update account balances daily
- Administer participant loans
- Provide participants with a robust online portal with tools such as goal setting, ability to manage their own investment, and full access on any mobile device
- Enhance your recruiting and retention efforts by offering a user-friendly platform to manage this valuable benefit



Exceptional Solutions for Every Business

Investment flexibility

Choice and control are the key components of a tailored 401(k) plan. ePlan Services provides the options and freedom to design a plan that meets your unique needs.

- Choose from an open architecture menu of investment options
- Complete investment neutrality with no proprietary requirements

In addition, ePlan Services has partnered with Mesirow Financial to provide fiduciary services that help mitigate the fiduciary risks associated with investment selection and monitoring.

With Mesirow Fiduciary Partnership Services, you can choose the “Help Me Do It” Investment Advisory Service under section 3(21) of ERISA, or the “Do It For Me” option for full investment management under section 3(38) of ERISA. Both options provide legal protection, flexibility of solutions, and years of expertise backed by Mesirow, a pioneer of third-party fiduciary solutions.

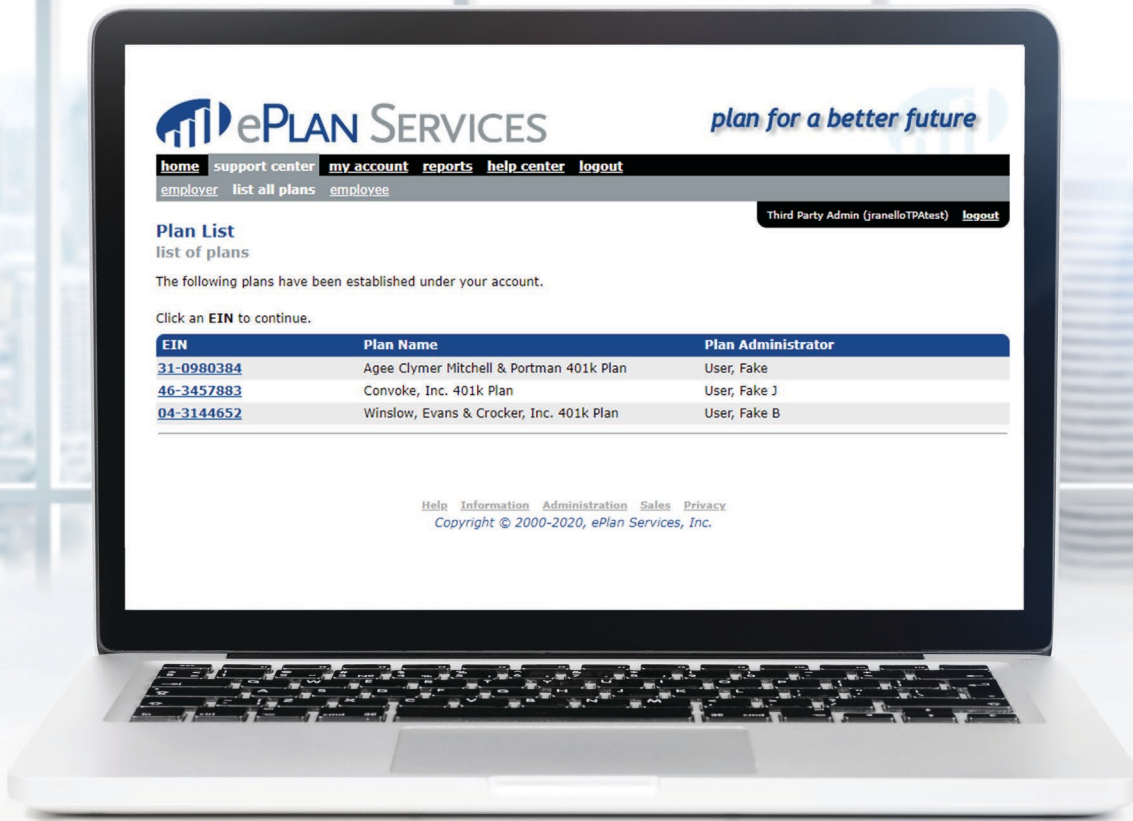
Coordination with any payroll provider

No matter how you do your payroll, ePlan Services helps ensure a smooth transfer of information between the payroll provider, TPA, and our services. All contributions to the participant accounts are accurate and timely.

Online plan management

The complete online platform delivers real-time plan and participant-specific data when you need it.

- Online 15-minute plan establishment
- Online portals for plan sponsors, participants, Third Party Administrators,
- Access to all plans and documents, investment lineups, enrollment materials, advisor participation information, and more
- Online Quick Enrollment for eligible participants. An easy and intuitive way to enroll with just a few clicks — enroll online or use the mobile app



Meet ePlan Services

ePlan Services was founded in 1999 for the purpose of distributing 401(k) plans to the small and medium size business community through Fee-Based Advisors, RIA's and White Label Partners. In June of 2011, ePlan Services was acquired by Paychex, Inc and is still a wholly owned subsidiary of Paychex today.

\$2+ billion assets

ePlan Services has the experience needed to operate successful 401(k) plans for small and medium sized businesses

96,000+ participants

ePlan Services is trusted by more than 96,000 employees

5,600+ 401(k) clients

More than 5,600 employers use ePlan Services' 401(k) solutions

**Be confident with a
trusted provider**

For more information about
recordkeeping, call or
visit us online today.

888-384-6767
www.eplanservices.com