



FOR 401(k) RETIREMENT INFORMATION
Contact the SLU Chamber at: (206) 547-2577
or, Jason McKinney, Plan Advisor at: (206) 271-9916
or visit: www.myfuture401k.com

PLAN SOLUTION

My Future 401(k) Plan offered by the South Lake Union Chamber of Commerce is a Multiple Employer Plan that enables unaffiliated Employers to adopt and offer a retirement plan, built on a model of aggregated shared services. By leveraging economies of scale, the My Future Plan provides adopting employers with lower costs, a lessened administrative burden, and reduced fiduciary risk.



WHY AGGREGATION?

- Provides the greatest support to the employer and the participant in the most cost effective manner possible in the market today
- Allows the plan to be serviced by a Professional Plan Administrator with full accountability to the employer, the employee, and the federal regulatory agencies
- Allows professional investment management of all investments in the plan
- Allows greater negotiating power with the record keeper

KEY FEATURES / SERVICES

- Low Cost — Only \$500 / year with valid SLU membership
- Flexible Plan Design
- Reduced administrative burden — one TPA
- Annual compliance testing and preparation of IRS form 5500
- Reduced fiduciary liability — one Trustee
- Investment grade investment options, including professionally managed risk-based
- Onsite education and enrollment services from a local investment advisor
- Participant website with online tools, calculators, and investment materials

WHAT IS A MULTIPLE EMPLOYER PLAN?

An aggregation of a large number of single 401(k) plans with:

- One Contract
- One record keeper & TPA — **Future Benefits of America**
- One custodian for plan assets **Midatlantic Trust company**
- One named plan administrator, ERISA 3(16) — **Fiduciary Doctors**
- One named full scope fiduciary ERISA 3(21) — **Fiduciary Doctors**
- One named financial advisor — **Integrity Financial Corporation**
- One CPA for all plans subject to an audit

