Put your 401(k) on autopilot

Benefits of joining

By partnering with Equitable, we will put the wind under your wings in managing a retirement plan. When you join, you can reduce the responsibilities as a plan sponsor and focus on what’s most important to you — your business. We will help relieve the administrative burden you are currently experiencing in the workplace. By sponsoring a 401(k) plan, it can help you attract and retain top talent.

How to prepare for takeoff

Operational standards that maintain:

- Frequency of enrollment and educational meetings
- Enrollment materials with the Summary Plan Description (SPD)
- Procedures to address participant inquiries
- Validation of compliance testing
- Annual audit of the plan

Nominating a plan fiduciary who can:

- Maintain an Investment Policy Statement (IPS)
- Select and monitor investments according to the Employee Retirement Income Security Act of 1974 (ERISA)
- Establish quarterly investment meetings to review current investments available in the plan, expenses and performance using benchmarking

Lower costs

Lower your administration expenses while improving outcomes for your employees

Reduce liability

Make it easier for you to control and reduce your liability; clients still maintain full control while shifting the risk

Three-step process

Select

Customized plan design with options to meet the needs of the business and employees

Submit

401(k) file each pay period is on autopilot, just run your payroll

Serve as co-adopter

Options of sponsored and outsourcing of plan trustee and investment fiduciary duties
For more information, contact:

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