



# Starting a 401(k)? Here's Your Roadmap

*Avoid costly mistakes with a structured approach.*

## **Step 1: Define Goals**

- Talent retention
- Tax benefits
- Budget constraints

## **Step 2: Build Your Team**

- Advisor
- TPA
- Recordkeeper

## **Step 3: Design Plan**

- Plan type
- Contributions
- Match
- Eligibility
- Automatic features

## ROADMAP



**30-90 DAYS**

## ***Step 4: Implementation***

- Documents
- Payroll setup
- Investments
  - QDIA

## ***Step 5: Launch***

- Employee education
- Enrollment support



## **Ready to See Your Plan from a New Perspective?**

*Streamlined setup, meaningful long-term value for your organization and employees.*