



Design a Plan That Drives Results

The right design can boost participation and retention.

Core Plan Types

- Traditional
- Safe Harbor

Key Features

- Auto-enrollment
- Auto-escalation
- Roth contributions

Employer Contributions

- Matching formulas
- Profit sharing
- Vesting schedules

Strategic Considerations

- Cost control
- Talent retention
- Participation goals



Plan design should align with your workforce and business strategy.