



Big Savings for Small Businesses



If there's anything we've learned in recent months, it's that small businesses are strong. Together, we can make sure they stay that way.

Position your clients and their employees for a brighter future—while providing them with the relief they need today.

A retirement plan helps employers attract and retain talent, and the auto-enroll feature boosts participation to amplify these benefits. For a limited time, you can deliver this business advantage—which is needed now more than ever—for even less.

Clients can **save as much as \$1,500** on Ascensus plans, both new and transfer, between now and December 31, 2020. Read the details below to see if your client's plan qualifies.

Concession Off First-Year Base Fee

PARTICIPANTS	AUTO-ENROLL ¹	NO AUTO-ENROLL
1 – 20	\$500	\$300
21 – 100	\$1,000	\$500
101+	\$1,500	\$1,000

Discounts apply to Ascensus fee-based, full service and recordkeeping-only plans, both new and transfer, regardless of the date the proposal was issued. The concession will be applied when a Plan Establishment Kit (PEK) is returned in good order by December 31, 2020. For new plans with a January 1, 2021 start date, the PEK must be returned in good order by November 13, 2020.

Ascensus plans come with these benefits:

- ✓ **Freedom**
to choose funds best suited to the plan, with no effect on pricing
- ✓ **Simplified administration**
through our Enhanced Administrative Service Experience²
- ✓ **Predictable pricing**
that's transparent and easy to understand
- ✓ **Financial Wellness**
benefit for every participant at no additional cost
- ✓ **56 Best-in-class awards**
combined in Technology, Sponsor Support, Investments and Fees, Plan Administration, and Education³

For more information, please call 800-345-6363.

¹Auto-enroll must be adopted for all current and prospective eligible employees.

²To qualify for the Enhanced Administrative Services Experience, plans must be full service, on the Ascensus plan document, and elect approved provisions.

³2019 PLANSPONSOR Defined Contribution Survey, January 2020.