

Flex Pricing

Choose Flex if you're focused on maximum plan flexibility at an affordable, bundled price point.

BASE FEE¹

\$250 / month

PER PARTICIPANT WITH A BALANCE FEE¹

\$8 / month

 Saving with Vestwell can cost savers up to **8x less** than the industry average²

PERSONALIZED SERVICE

- ✓ 1:1 Onboarding Contact
- ✓ Dedicated Service Team
(Accessible via Phone, Email, Live Chat)
- ✓ Comprehensive Help Center
- ✓ Saver Learning Portal
- ✓ Educational Content
(Enrollment Webinars, Newsletters, Blog Posts, etc.)
- ✓ Multilingual Call Center
- ✓ Rollover Support
- ✓ Plan Design Consultation Available with Vestwell Flex Partner

STREAMLINED PLAN MANAGEMENT

- ✓ Recordkeeping
- ✓ Custody
- ✓ Government Form Filing
- ✓ Compliance Testing and Tools
- ✓ 3(38) Investment Management
- ✓ Advisor Managed Accounts³
- ✓ Seamless Payroll Integrations
- ✓ Digital Onboarding
- ✓ On-the-Go Mobile App
- ✓ Open Architecture Platform
- ✓ Custom Saver Investment Options
- ✓ Additional TPA Services

CUSTOMIZABLE PLAN DESIGN

- ✓ **Investment Lineup:** Non-proprietary Standard 3(38) or Custom Lineup
- ✓ **Startup/Conversion Status:** New Startup Plans or Conversion Plans
- ✓ **Hardship Withdrawals and Loans:** Available
- ✓ **Eligibility Requirement:** Complex Options
- ✓ **Employer Contributions:** None, Safe Harbor (Match, Non-elective or QACA), or Discretionary Match Options
- ✓ **Profit Sharing:** None, Pro-Rata, Integrated, or New Comparability
- ✓ **Vesting:** Immediate, Elapsed Time, or Hours-based

Need a proposal? Reach out to proposals@vestwell.com

¹Does not include: Investment-related fees, a one-time \$1250 setup fee, fees associated with profit sharing contribution arrangements, and certain TPA-related fees. Vestwell's pricing and other fees associated with your plan may also change if your payroll company charges Vestwell for an integration with our platform, in which case this fee is passed on to the employer. The pricing being offered is only valid for 30 days from the date the proposal is received.

²See 401(k) Averages Book, 24th Ed. (2023) based on industry average, including recordkeeping, investment management, and fund expenses, for plans with 25 participants and \$250,000 average account balance. Expense ratios vary and are subject to change.

³Fees may apply

Vestwell Advisors provides investment management services to 401(k), 403(b) and other retirement plans. Neither this nor any other material on our websites is an offer, solicitation, or advice to buy or sell any securities. Investors should consider their objectives, risks, expenses, and other factors before investing and may wish to engage their own financial professional.