

# Flex Pricing

## VESTWELL FLEX

Flex is a great option for businesses seeking maximum flexibility with plan design at an affordable and bundled price point.

BASE FEE\*

**\$250** / month

PER PARTICIPANT FEE

**\$8** / month

### SERVICES

- ✓ Recordkeeping
- ✓ Custody
- ✓ Investment Management
- ✓ Third Party Administrator
- ✓ Optional ERISA 3(16) Services

### SERVICE DETAILS

- ✓ Dedicated Service Team
- ✓ Streamlined Administration
- ✓ Payroll Integration
- ✓ Plan Design
- ✓ Plan Consultation

### PLAN FEATURES

- ✓ Loans, In-Service & Hardship Withdrawals
- ✓ Optional Match & Profit Sharing
- ✓ Flexible Safe Harbor Options
- ✓ Plan Document
- ✓ Optional Auto Enroll
- ✓ Flexible Eligibility Options
- ✓ Optional Vesting

- ✓ Provided by Vestwell's core services
- ✓ Provided by Your Plan's TPA (Third Party Administrator) Partner

### Need a proposal?

Reach out to [proposals@vestwell.com](mailto:proposals@vestwell.com)

\*Does not include: Investment-related fees, a one-time \$1,250 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.

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