

CASE STUDY

The Verdict Is In: Boston Avenue Law's Retirement Plan Success With Vestwell

Employer

To differentiate his firm, Howard Berkson knew he had to capitalize on the one thing that can't be replicated—the people.

To capture the talent that would set [Boston Avenue Law](#) apart, Howard partnered with Vestwell, a modern savings platform building a suite of retirement, health, and education solutions. **By streamlining administrative tasks and simplifying plan management, the partnership empowered Howard to demonstrate his commitment to the firm's most valuable asset—its people—by offering a 401(k) plan that achieved 100% employee participation.**

The Challenge: Boston Avenue Law Sought a “Turnkey” Retirement Plan Solution

After graduating from law school, Howard Berkson leveraged his background in business and human resources to found Boston Avenue Law. To build a team that would drive the firm's success, he knew he needed a compelling benefits package—one that included a retirement plan.

But, running a law firm is no small feat, and as the managing member, Howard juggles both client needs and business operations. **"I have to do my regular day job as an attorney plus run the business," Howard explained. "What I really wanted was something turnkey."** Howard sought a retirement plan provider that would offer competitive benefits for his team while requiring minimal time and effort to manage.

The Solution: A Low-Lift Retirement Plan From Vestwell

After researching a handful of retirement plan providers, Howard chose Vestwell. With the help of Vestwell's dedicated onboarding team, Howard was able to quickly and easily launch a 401(k) plan for his business. "It took about 30 minutes total," Howard said, emphasizing the speed and efficiency of the onboarding process.

Vestwell offers both highly customizable and turnkey plans, allowing businesses to effortlessly launch a retirement savings solution that fits the unique needs of their business and employees, with minimal administrative lifts.

Vestwell's payroll integration, user-friendly portals, and simplified compliance management allowed the firm to focus on what truly matters—building lasting value through its employees.

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30 minutes total.

Howard Berkson,
Attorney and Managing Member,
Boston Avenue Law

Effortless Payroll Integration With Patriot Software

Vestwell's [integration](#) with the firm's payroll provider, Patriot Software, streamlined retirement plan administration for Boston Avenue Law by automatically syncing employee data directly from the payroll system. **"The integration means that there is very little I have to do," said Howard.**

According to the 2024 Vestwell Employer Survey, the majority of Vestwell clients with a payroll integration spend 15 minutes or less each month managing their Vestwell retirement plan. Boston Avenue Law needed a retirement plan that could run effortlessly in the background, and Vestwell delivered just that.

User-Friendly Platform and Resources That Empower Savings

Boston Avenue Law employees have varying retirement timelines and risk preferences. **Vestwell's user-friendly platform gives employees flexibility when it comes to managing their savings.**

From customizing their savings rate to choosing the right path for their investments, employees can tailor their plan directly from their portal. "I'm much closer to retirement than our newest associate, so we needed a wide range of offerings," Howard shared. **"I was pleasantly surprised at the quality and quantity of options Vestwell had available."**

Plus, [Vestwell's Help Center](#) offers hundreds of educational articles and videos, empowering employees to make informed decisions about their financial future.

"I don't have to do anything. Once the employees are in the system, my job is finished."

Howard Berkson, Attorney and Managing Member, Boston Avenue Law

Simplified Compliance Equals Simplified Administration

As a law firm, compliance is part of the daily routine for Howard and his team. To avoid additional regulatory requirements, Vestwell's Plan Design Consultants guided him through curated plan design recommendations, leading him to choose a [safe harbor](#) plan.

"I had a choice, and I chose no extra work. **Vestwell did an excellent job making that happen.**"

Howard Berkson, Attorney and Managing Member, Boston Avenue Law



Safe Harbor plans allow employers to bypass the IRS's annual nondiscrimination tests, meaning that Boston Avenue Law can offer a competitive employee match without the stress of extra compliance work. **"The Safe Harbor program makes it so that I don't have to worry about compliance," Howard explained. "It's a generous plan that keeps things simple for us."**

The Impact: A 100% Participation Rate With Zero Hassles

Boston Avenue Law's 401(k) plan has a 100% participation rate among eligible employees. The effortless process of launching a retirement benefit has allowed Howard to focus on building lasting value for his firm without managing a complex plan. **"I have never had to reach out with any questions. It's great. It really is fire and forget."**

Vestwell's platform has simplified administration for Howard while providing his employees with a path to a secure retirement. Ultimately, Boston Avenue Law's partnership with Vestwell has enabled the firm to continue capitalizing on their unique competitive advantage—their employees.

Conclusion

By partnering with Vestwell, Boston Avenue Law elevated their employee benefits package with a low-lift 401(k) plan. Through a seamless payroll integration, an easy-to-use portal, and a streamlined plan design, Vestwell enabled Howard to recruit and retain top talent, while investing in his business's greatest asset.

Set your employees and your business up for success. Vestwell's team of specialists will help you design and implement a workplace benefits package that works for your unique business. Ready to get started? Set up time with a Vestwell representative [here](#).



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