

CASE STUDY

A Perfect Pairing: How Flights Wine Bar Improves Retention With Vestwell's Retirement Benefits

Employer

Flights Wine Bar partnered with Vestwell to launch a low-maintenance 401(k) plan that improved retention and resulted in a 92% participation rate.

Vestwell's seamless payroll integration with Patriot Software enabled Flights Wine Bar to provide invaluable benefits while saving time on plan administration.

By harnessing tax benefits like the startup and auto-enrollment credits, Flights Wine Bar was able to offset plan costs.

“The restaurant industry has a high turnover rate. It’s something we’re constantly struggling with,” said Kelsey Daniels, owner of Flights Wine Bar. **The average annual turnover rate in food services is 86.3%**, almost twice as high as the national average. “There’s a million restaurants people could work at, so we want people to enjoy coming to work and feel valued,” she explained.

To offer her staff the invaluable benefit of saving for retirement without sacrificing time or resources, Kelsey chose Vestwell, a modern savings platform building a suite of retirement, health, and education solutions, as their 401(k) plan provider. **The partnership enabled Flights Wine Bar to offer an intuitive, cost-effective retirement plan that boosted employee retention.**

The Challenge: Boosting Employee Retention

Kelsey's wine bar is known for its curated selection of wines from around the world—but that's not why she chose the name "Flights." Her husband and co-owner, Kent Daniels, is a helicopter pilot, putting out fires all along the west.

As the owner of a full-service restaurant, wine bar, and tasting room, Kelsey is often putting out fires of her own. Kelsey understood that providing employee benefits in the hospitality industry could differentiate her business from others, but as a new business, it was key to consider both time and financial constraints. **With her busy schedule, Kelsey needed an easy-to-use, cost-effective benefit that would encourage tenure from Flights Wine Bar employees.**

The Solution: Implementing Robust Retirement Benefits Through Vestwell

Kelsey discovered Vestwell while attending a webinar hosted by Flights Wine Bar's payroll provider, Patriot Software. **The ability to offset plan costs with tax credits—plus dedicated customer support and a payroll integration—was exactly what she needed.**

Tax Benefits That Offset Plan Costs

In the hospitality industry, benefits tend to be less available to employees, often due to affordability concerns. "Low cost was big," Kelsey explained. Offering a retirement plan through Vestwell allows Kelsey to offer competitive benefits to her staff while offsetting costs. **Kelsey estimated that in Flights Wine Bar's first year with Vestwell, tax credits would cover their startup fee and all monthly fees.**

With the [startup credits](#) enhanced by the [Secure Act 2.0](#), employers with 50 or fewer employees, like Kelsey, receive a 100% credit for eligible expenses up to \$5,000 annually. Additionally, the [auto-enrollment credit](#) provides \$500 per year, claimable for up to three years. Providing these critical benefits while offsetting costs gives Flights Wine Bar a competitive edge.

"When we found out about the tax benefits that could help us offset costs, that was a big deal."

Kelsey Daniels, Owner, Flights Wine Bar

Seamless Payroll Integration With Patriot Software

Vestwell's 360° integration with Patriot Software streamlines retirement plan management.

With the integration, information is automatically transferred between systems, saving time and minimizing the risk of errors.

"It's a little overwhelming to try and take on something like managing a 401(k) plan when I have no experience," Kelsey said, explaining that the payroll integration provides the automation she needs to manage her plan with confidence and ease. In fact, Vestwell's straight-through processing rate is 99%, meaning transactions are processed without the need for manual intervention.

When I run payroll, contribution and election data is magically transferred, which is exactly what I needed.

Kelsey Daniels, Owner, Flights Wine Bar

Dedicated Customer Support From Start to Finish

For Kelsey and her employees, Vestwell's responsive support team has been a major help.

"My employees can contact Vestwell directly if they have questions or want to make changes to their plan," she shared, "It doesn't have to come through me."

Kelsey's staff varies in age, and for some of her younger employees, working at Flights Wine Bar has provided them with the opportunity to save for retirement for the first time. Vestwell's support team is available for any questions employees may have—plus, Vestwell's help center has over 375 articles to equip savers with the knowledge they need for success.

The Impact: Improved Retention With A Low-Maintenance, Cost-Effective Retirement Plan

Kelsey was seeking a simple, cost-effective solution to add value for her employees and compete for talent in the hospitality industry. With Vestwell's cost-effective plan, 360° payroll integration, and dedicated service team, she was able to do so.

Flights Wine Bar has a 92% Participation Rate for Eligible Employees

Flights Wine Bar has an impressive 92% participation rate for eligible employees—well above the median participation rate of 56% for accommodation and food services workers. By offering retirement benefits to their staff, Flights Wine Bar has supported employees and encouraged retention without compromising time or resources. **"It's something that will keep them on longer because they're seeing Flights as more of a career versus just a stop along the way,"** Kelsey explained.

"I'm not an accountant. I'm not an investment strategist. So the fact that it's simple is really huge for me."

Kelsey Daniels, Owner, Flights Wine Bar

Conclusion

With tax benefits, a seamless payroll integration, and customer support from start to finish, Kelsey provided her staff with the opportunity to prepare for a secure financial future while saving time and offsetting costs.

Set your employees and 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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