

# CompleteK A Full-Service Solution 401(k) Plan & Administration

For small and midsize business owners, offering a 401(k) plan is an attractive tool for recruiting, rewarding and retaining talented employees.



## Investment Options

CompleteK provides a diverse array of investment options from dozens of the most respected names in the mutual fund industry. Employees can choose from a variety of investment categories and styles – all the choices they need to build a diversified retirement portfolio.

## Online Investment Education and Tools

To help employees understand their options and help them reach their retirement goals, CompleteK provides online investment education and interactive planning tools that accommodate different levels of investment knowledge.

## Affordable and Easy to Maintain

If administrative complexity and costs associated with traditional full-featured 401(k) plans have prevented you from offering a 401(k) to your employees in the past, consider CompleteK.

A streamlined, full-service recordkeeping and administration service combined with a wide array of high quality investment options makes CompleteK the highest valued retirement program in the marketplace today.



**CompletePayrollSolutions.com**  
**877.253.9020**

## Wide Array of High Quality Investment Options



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CompletePayrollSolutions.com | 1.866.658.8800

# CompleteK 401(k) & Administration

## A Full-Featured Plan

### Program Features

- Open Architecture/ Multiple Fund Families
- No-Load/Load-Waived Mutual Fund Trading
- No Wrap Fees/No Hidden Costs
- 401(k)/Profit Sharing/New Comparability Plans
- 30 Plan Level Investment Options
- IRS-Approved Plan Document
- Plan Disclosures:
  - Summary Plan Description (SPD)
  - Summary Annual Report (SAR)
  - Loan Policy (if applicable)

### Recordkeeping & Administration

- Daily Valuation Accounting
- Unlimited Intra-Account Transfers
- Integrated Voice Response System
- Integrated Contribution Processing
- Optional Participant Loans
- Quarterly Account Statements
- Annual Plan Review & Compliance Testing
- Signature-Ready Form 5500
- Employee Tax Reporting

### Employer Online Services

- Daily Plan Snapshot
- Account Profile Management
- Employee Census Management
- Employee Deferral Tracking
- Proactive E-mail Notifications
- Toll-Free Administrative Assistance

### Employee Online Services

- Daily Account Snapshot
- Account Profile Management
- Manage Deferral Elections
- Manage Investment Elections
- Toll-Free Participant Assistance
- Retirement Planning Tools & Calculators

## Integrating 401(k) & Payroll

### Worry-Free Setup, Enrollment and Maintenance

CompleteK's fully integrated 401(k) solution provides for the seamless integration of information between our payroll and 401(k) system, eliminating frustrating data submissions and expediting plan deposits and year-end compliance requirements. We handle participant enrollment, all required form filings, and communications with participants. Our integrated process and one-on-one customer service will make managing your company's 401(k) plan easier, more efficient and improve plan accuracy.

Learn more by calling us today!

