

401(k) Fee Schedule

Administered Plans
Effective August 1, 2019



312-795-0988
Fax: 312-283-2615
iraclub.org

Flat Fees: 401(k) Prime fees do not increase as your account grows (unlike some providers)

One Time Account Set Up	\$60
Annual Membership	\$365

Annual Membership Includes:

- ✓ Complete set of plan documents (*all plan documents have earned a favorable opinion letter*)
- ✓ Administration and record keeping
- ✓ Unlimited assistance from a Solo 401(k) Prime professional
- ✓ Necessary forms to complete your plan transactions
- ✓ One complete transaction (buy or sell) annually
- ✓ FDIC insurance on the cash held in the account
- ✓ Your plan's annual IRS filings (*including Form 5500 and 1099R*)
- ✓ Addition of the spouse to the Solo 401(k) plan (*secondary membership fee applies*)
- ✓ Ongoing DOL required updates to plan documents (*to address IRS and DOL required plan amendments*)
- ✓ Easy Roth 401(k) set up

- Minimum account balance \$500
- Fees are automatically deducted from the 401k account.
- Transactions after the first transaction (annually) are based on IRA Club's low fee schedule.
- Fees may be subject to change. Visit www.iraclub.org for the current fee schedule.

Already have a plan from another provider and would like to upgrade to a:

Professionally Administered Solo 401k

401k Prime makes the transition easy!

For as little as \$199, your plan can be professionally administered in a matter of days.