

Platform & Services



401GO is a comprehensive solution for 401k plans. At the core of our powerful and highly automated offering is the 401GO proprietary record-keeping and administration system. Our robust solution involves a full API integration with Matrix Trust Company as the custodian and FT William as the plan document provider. The result is a robust and modern solution that is capable of replacing legacy systems.

Fully Bundled

Record Keeping
& Administration

Robust Plan Design Options
Automated Plan Setup
Testing and Compliance
Profit Sharing Calculations
Prepare and File 5500
3(16) Fiduciary
Two Factor Authentication
Bank-Level Security
Track and Manage Plan Assets
Trade Execution
Participant Notifications
Eligibility Tracking
Investment Selection Platform
Investment Re-balancing
Customer Service
Loans and Distributions
Solo K and Cash Balance Options
Inbound Rollover Automation
Multiple Payroll Integrations



Investments - Advisors

Unbundled or Bundled 3(38) Option
GoInvest 3(38) funds
Investment Strategy Builder - Custom Portfolios
Guided Employee Enrollment
Retirement Readiness Education

Plan Documents

IRS-Approved Plan Document
Customized Plan Document Design
Automated Plan Document Creation
Real-time Plan Provision Updates
Streamlined Plan Amendments

Custodian - Trust

Full Integration with Matrix Trust Co
Access to more than 31k Investments
Streamlined 1099 Services
Integration with TAMPs