


Establishing, amending, and restating plans made easy with Ascensus' Employer Direct Document Service

 Initiate services today for an annual fee of \$250

Ascensus provides a total outsource document solution for employer-sponsored retirement plans by becoming the plan document sponsor. Our service allows you to focus on your clients while our experts focus on the IRS-required plan document sponsorship duties, ongoing document maintenance, and ever-changing document compliance.

Features

Plan document suite

Defined contribution plans

- 401(k)/profit sharing nonstandardized
- Money purchase pension nonstandardized
- Individual 401(k) standardized

403(b) plans

- ERISA 403(b) nonstandardized

Defined benefit plans

- Solo defined benefit standardized


Web-based

Ascensus does all of the document processing—your clients complete the online design questionnaire and their compliant documents are delivered through a secure web portal and can be signed electronically.

Customized summary plan description (SPD)

An SPD is generated based on the plan provisions selected by your clients in the digital plan design questionnaire.

For more information and to establish a plan, contact us.

 866-604-7402

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*Additional fees apply

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