

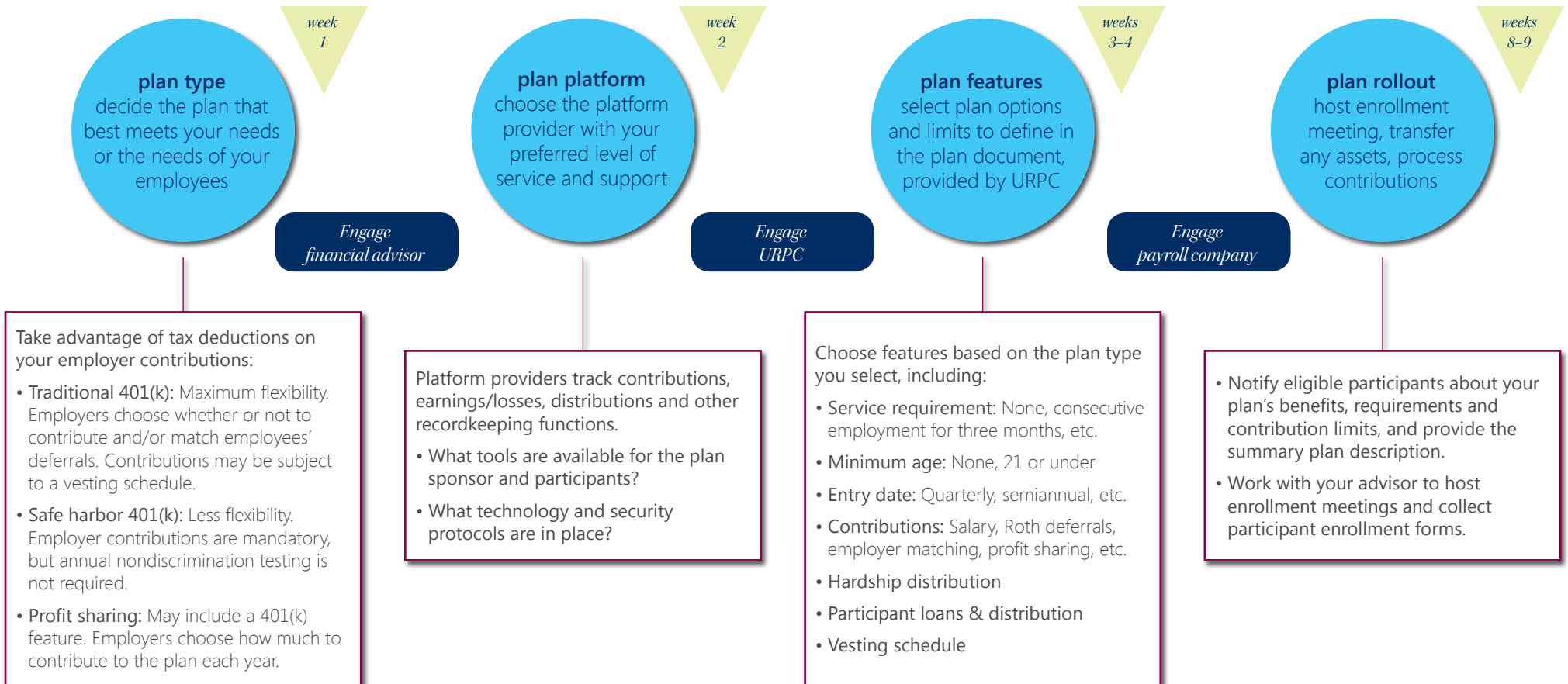


United Retirement Plan Consultants

National network. Local experts.

Your path to retirement savings.

Let URPC make starting a retirement plan easy. Our retirement plan professionals deliver the most cost-effective and tax-efficient retirement plan solutions. Contact your local Sales Consultant or our Sales Support team for assistance at (855) 439-6709 or SalesSupport@UnitedRetirement.com.



These are general suggestions and timelines. They are not intended for specific client use and are subject to change. No decision should be made without consultation.



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National network. Local experts.

Plan design—Are you asking the right questions?

Starting a 401(k) is easier when you understand what the plan sponsor needs. **Let URPC design the ideal plan.** We work with retirement specialists, financial consultants, registered investment advisors and financial intermediaries to deliver best-in-class retirement plan solutions.

What are your goals?

- Employee benefit and/or retention
- Tax deduction on employer contributions

Who do you want to most benefit?

- All employees
- Owner/key employees
- Specific category of employees (e.g. full-time)

What is your employer contribution budget?

- None—Employee contributions only
- Percentage of payroll

What is your employee turnover rate?

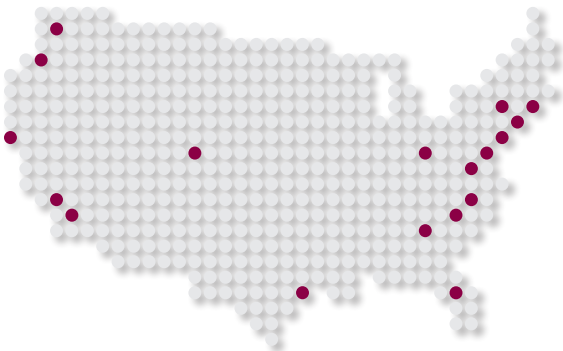
Describe problems with previous plans.

- Low participation
- Budget constraints

What plan features would you like to include?

- Effective dates
- Eligible participants
- Minimum age and service requirements
- Entry date
- Employer contributions
- Loans & distributions
- Vesting schedule

Is staff time assigned to manage the plan?



Your goals for tomorrow drive choices today.

Contact your local URPC Sales Consultant or our Sales Support team for plan design consultation, illustrations, fee quotes and proposals.

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