



Small Plans Simplified

401(K) Plan Design for Small Businesses Made Easy

Choose your vesting, eligibility and withdrawal options

Requirements:

- No more than 25 eligible participants*
*limited to employers with less than 50 total employees
- Utilize an investment recordkeeping platform.
- Safe Harbor Contributions*
*Additional charges will apply for tested plans.
- Electronic files for payroll submission, if utilized.
- Utilize DBZ prototype document.

Fees:

- One Time Set Up Fee: \$500
- Annual Administration: \$975
- Contribution Submission: \$25 per upload

Fees include:

- Dedicated point of contact
- Eligibility verification
- Review of participant compensation, including the review and application of the Annual Compensation Limit.
- 410(b) Coverage Testing
- Standard asset reconciliation
- Preparation of Summary Annual Report for Participants
- Prepare the IRS/DOL Annual Return/Reports: Form 5500 with applicable attachments
- Set up fee includes initial Plan Document preparation or restatement, including Summary Plan Description

\$500 per first 3 years Small Plan Tax Credit may be available for start up plans.

Contact us at proposals@dbzinc.com or call us at **412-263-0102**, for more information on Small Plans Simplified or to set up a plan.

Since 1991 our more than 60 professionals have provided companies, just like yours, with recordkeeping, administration and actuarial services for their retirement plans. DBZ services more than 2,500 clients ranging in size from 1 to several thousand employees. We are proud of our reputation for providing efficient, accurate and affordable services to our clients.