

Introducing a Smarter Way for Participants to Manage their 401(k) or 403(b) Plan

Building your retirement dreams.

*Take a tour -
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And click on the tour*

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Welcome to SmartPlan Enterprise

SmartPlan is a quick and easy guide to your 401(k) plan -- showing you everything you need to know, from enrollment to retirement.

SmartPlan is interactive. You can navigate where and when you want, just like any other website. Or, you can sit back and let us guide you through virtually everything you need to know about your 401(k) plan.

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SmartPlan is a quick and easy way for your Plan Participants to learn about your 401(k) or 403(b) plan. All that is needed from you is participant data in a pre-determined format and the rest of the enrollment process is completed for you. No more following up with participants to ensure you receive their paperwork, no more filing of hard copies of documentation, just provide a simple spreadsheet and SmartPlan enrolls your Participants for you! Contact us to schedule a demonstration or to learn more about what SmartPlan can offer you and your Plan.