

PetiteK

OVERVIEW

The PetiteK 401k plan is best suited for small businesses that need a Safe Harbor 401k plan. What exactly is a Safe Harbor 401k? These types of plans allow small business owners and top employees to contribute maximum contributions to their plan without having to worry about potentially getting money refunded back at the end of the year during plan testing.

By making a dollar-for-dollar matching contribution for participating employees (up to 4%) or by making a 3% contribution for all eligible employees, companies can take advantage of a safe harbor 401k plan for their business and pack away maximum contributions (up to \$18,500 for personal contributions and capped at \$55,000 in total contributions.*)



PRICING INFORMATION

Pricing for the PetiteK 401k Product is easy and transparent. You simply pay a \$250 dollar one-time setup fee to get the plan established. After that, the cost of the plan is just \$50 per month for the business.

Any business owner setting up a plan may be entitled to a tax credit of up to \$500 in the first 3 years the plan has been established. Talk to your tax advisor for more information on this program designed to help make it easier for business owners to get started with a 401k!

SETUP

Getting started with a plan has never been easier. Simply go to www.SaveAway401k.com/setup and fill out the enrollment information. One of our team members will contact you to finalize information to get you going. Once we work out the specifics of your plan with you, you'll be ready to start saving.

ADMINISTRATION

Once your plan is setup, administration is easy. You can log into your account and check account balances, recent activity, or change your contribution amounts. Making modifications to model portfolios or investment choices is a snap.

