

5 top reasons to partner with Synergy's Retirement Solution.

OFFER YOUR PAYROLL CUSTOMERS A **TURN-KEY 401K PLAN**



1

Compete with the **big guys**.

Larger, competitive payroll companies offer a 401K service as part of the package. Offering 401K retirement services not only allows you stay competitive, increase profit and expand business, but also satisfy and retain current customers. By partnering with us you can offer the favorable 'one-stop shop' and offer your customers the full-range of financial services.

2

Offer this service as a **benefit to your customers**.

By participating in the Synergy Retirement Plan program, your Company instantly accesses a team of industry leaders that leverage experience and expertise to create a comprehensive turn-key plan solution to better serve your organization and its employees. By choosing Synergy Retirement Plan you and your employees enjoy the benefit of "big plan pricing and service".

BENEFITS TO YOUR CUSTOMERS



FREE 401K PLAN SET UP ANALYSIS

We will review their current plan for FREE



PROFESSIONAL INVESTMENT ADVICE

Investment guidance from proven professionals



MODEL INVESTMENT PORTFOLIOS

Managed Investment portfolios with proven superior performance



LOW FEES FULLY DISCLOSED

Synergy has a low and transparent fee structure



EXCEPTIONAL PERSONALIZED CUSTOMER SERVICE

A single dedicated contact person familiar with your plan



CUSTOMIZED 401K PLAN FOR YOUR COMPANY

A customized plan for your business—not one size fits all



TURN-KEY ACTIVATION

Integrates seamlessly with current systems



EMPLOYEE EDUCATION

Comprehensive educational tools and personal investment advice



NO TEDIOUS RECORDKEEPING

All data and deferrals run through your current payroll systems

**3**

No administration work for you.

Let us do all the heavy lifting by taking care of all the day-to-day administration. Through our plan administrative team, we will:

- ✓ **Calculate and remit** all employee deferrals and employer contributions
- ✓ Identify newly eligible employees and **provide enrollment kits** direct to each employee's home
- ✓ **Process all new enrollments** and deferral changes
- ✓ Provide recommendations and **process all employee distribution and loan requests**
- ✓ By clarifying our understanding of and **documenting the goals and objectives** of each client
- ✓ Process all investment election changes and **fund transfers**
- ✓ Perform all **required annual compliance testing** and government filing

**4**

Get paid; add as additional revenue stream.

Synergy Financial Management, LLC's revenue sharing program pays you (the payroll provider) revenue for the life of the 401k plan. Plus, fees grow as plan gets larger for the life of the plan.

5

All at zero cost to you.

\$00.00

Synergy Financial Management LLC has provided **retirement products for over 20 years.**

Experts with helping business owners establish a 401(k) that benefits the company with reduced taxes, and increases retirement savings for both the owner and employees.

Serving as a trusted partner, our team of 401(k) experts can design, monitor and manage a 401(k) plan that meets your company's goals. Because we operate independently from the actual retirement plan provider, we offer objective advice to be sure you are getting a plan that meets your needs at the lowest possible cost.

www.synergy401k.com



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Consider **benefiting your customers with a 401k plan option.**

Call 415-937-1773 or email jfeliz@synergeticfinance.com to start the conversation!

