

Benefit Consultants Group
PLAN IN A BOX FEE SCHEDULE
 Effective January 1, 2019

ONE-TIME PLAN SET-UP FEES:

Client Installation Fee \$500

ANNUAL PLAN ADMINISTRATION FEATURES AND FEES:
Annual Plan Administration Features Include:

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| • Daily Valuation of Participant Accounts | • Quarterly Participant Statements with Newsletter |
| • 24 Hour Toll Free Voice Response Unit *English or Spanish | • IRS Form 1099/945 Reporting |
| • Participant Account Internet Access | • Year End Compliance Testing |
| • Toll Free Client Service Center *English or Spanish | • 5500 Preparation, Signature Ready |
| • Web-based Financial Planning Software | • Quarterly Employer Reports |
| • ACH for Plan Fees | • Prototype Plan Document and SPD |

401(k), Profit Sharing Annual Administration Fees:

\$950	(Employer Paid on 10th day of 3rd,6th,9th,12th month)
\$30 per participant	(Deducted from Participant Account)
.50%	(Paid by Plan Assets Pro Rata)

SWBC Investment Management Fee:

.03%	(Paid by Plan Assets Pro Rata)
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Exclusive Agent Service Fee:

<\$1MM =	1.00%	(Paid by Plan Assets Pro Rata)
>\$1MM =	.75%	

ADDITIONAL EXPENSES

Distributions	\$65
Roth 401(k) Distributions	\$30 additional
Installment Payments for Distributions	\$5 per check
	\$3 per ACH (electronic fund transfer)
De-Conversion Fee	\$2,000
Loan Fee	\$165 / employee charge
Certification of Assets/Auditing Services	\$500 annually
Check Issuance Fee	\$20 per check
Review Domestic Relations Order	\$500 (minimum charge)