



*Simplifying Retirement Plans for Business*

# DAILY ADVANTAGE Open Architecture Platform



## Traditional Features

- Full disclosure and fee transparency
- Fiduciary services and support available
- 20,000+ mutual funds available at NAV with same day trading
- Exchange-Traded Funds (ETF's) available
- Daily processing and reconciliation of participant account activity
- Real-Time access to plan and participant data
- Professional participant and plan sponsor reporting
- Plan Design Services
- Plan Document Services
- Plan Compliance and Annual Reporting Services
- Plan Distributions, Loans and QDRO Administration

## Optional Features

- Managed Accounts or Investment Profiles
- Self-directed brokerage account via TD Ameritrade or Schwab PCRA
- Electronic payroll and year-end processing via alliance with PayBridge
- Online Deferral Contribution changes
- Online Enrollment Books
- Online contribution submissions
- Participant website access with company logo
- Participant Plan Education Video provided via alliance with SmartPlan
- Annual Plan Review reports
- Investment Advisor participant access to simplify individual consultations