

401(k) source list

401kAdministrators.com www.401kAdministrators.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	No / Yes
Frequency of investment changes	Daily.

Alliance Benefit Group 800-242-2356 www.abgil.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Alliance Pension Consultants 847-291-9440 www.alliancepension.com	
Availability	All states
401(k) rollover plans / Consolidate plans	No / No
Benefit statements / Consolidate into one account	Yes / No
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Belanger and Co. Inc. 610-239-9750 www.belangerandcompany.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / No
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	No / Yes
Frequency of investment changes	Unlimited

Best 401k Inc., The 800-430-8054 www.thebest401k.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Charles Schwab 877-456-0777 www.scrs.schwab.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

CPI Qualified Plan Consultants Inc. 800-491-7859 www.cpiqpc.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	

ExpertPlanInc. 866-929-2525 www.expertplan.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	No / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Plan participants can make investment allocation changes for future contributions based on allowable plan investment options.

Great-West Retirement Services 800-537-2033 www.gwrs.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Dependent upon plan rules.

Harbor Insurance Marketing Inc. 866-424-2167 www.harborins.com	
Availability	All states except NY
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily.

Ingham Retirement Group 303-671-2200 www.Ingham.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

MassMutual Financial Group 866-444-2601 www.massmutual.com/retire	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	daily

Mercer 857-362-2000 www.Mercer.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily, subject to specific client plan rules.

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MVP Plan Administrators Inc. 866-687-6877 www.mvpplanadmin.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Noble-Davis Consulting Inc. 440-498-8408 www.noblepension.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

OneAmerica 888-313-1955 www.oneamerica.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Online 401(k), The 855-401-7253 www.theonline401k.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Paychex Inc. 800-322-7292 www.paychex.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	No / Yes
Frequency of investment changes	Daily

Principal Financial Group 800-986-3343 www.principal.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	varies depending on plan features

Putnam Investments 800-719-9914 www.putnam.com/401k/	
Availability	All States
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	As frequently as daily based upon the plan document.

Retirement Advantage Inc., The 888-872-2364 www.tra401k.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Securian Financial Group, Inc. 877-876-4015 www.securian.com	
Availability	All states except NY
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Security Benefit 785-438-3397 www.securitybenefit.com , www.securityretirement.com	
Availability	All states
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	No / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

401(k) source list

Standard, The 877-805-1127 www.standard.com	
Availability	All States
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	As often as they wish.

Transamerica Retirement Services 888-401-5826 www.TA-Retirement.com	
Availability	All States
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

TSC 952-806-4300 www.tsc401k.com	
Availability	All States
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Daily

Vaughan & Associates Inc. 864-271-1298 www.RetirementPlanSolutions.com	
Availability	All States
401(k) rollover plans / Consolidate plans	Yes / Yes
Benefit statements / Consolidate into one account	Yes / Yes
Contribution flexibility / Tax-free loans available	Yes / Yes
After-tax contributions allowed / Calculate ROR	Yes / Yes
Frequency of investment changes	Anytime

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