

401(k) Connect

The Turn-Key 401(k) Solution

Why 401(k) Connect?

We recognized the need for a turn-key 401(k) solution for advisors like yourself. So we have aligned ourselves as 3 key partners working together to provide a seamless solution to 401(k) plan management.

Common Issues:

- Finding a TPA
- Supporting Fiduciary responsibility
- Finding a custodian
- Managing enrollments
- Selecting and monitoring investments



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Financial Advisor

Introduce to business owner
Create Fee-Based recurring revenue stream

Business Owner



Cornerstone Asset Management Services Inc.

Investment services
Plan design and consulting
Transition services
Participant education
Plan compliance support
Technology
Fiduciary support

Summit Benefit Solutions, Inc.

Mid-Atlantic Capital Group

Summit Benefit Solutions, Inc.

TPA

- Administration & recordkeeping services
- Tax reporting
- Plan design & support
- Enrollments (optional)
- Asset-based pricing

Cornerstone Asset Management Services, Inc.

Tactical 3rd Party Money Manager

- Actively managed separate accounts
 - Daily monitoring
 - Risk-based portfolios
- QDIA Options
- Select/Maintain core investment line-up
- Fiduciary support
- Asset-based pricing

Mid-Atlantic Capital Group

Custodian

- 1000's of mutual funds & ETF's
 - Non-insurance based
- Open architecture
- Web-based technology for trading and monitoring
- Access to ModelxChange®
- Asset-based pricing