



AICPA[®]
401(k) Plans for Firms

Easy.
Seamless.
Affordable.

The AICPA 401(k) Plans for Firms program makes retirement benefits a reality for your firm.

Comprehensive 401(k) solutions
designed for CPAs by CPAs



Affordable 401(k) plans made easy for you, your firm and your employees

Reducing taxes today, saving for tomorrow and finding and retaining top talent are top-of-mind issues for CPAs – and necessary for your business to succeed. 401(k) plans address these needs, and the AICPA 401(k) Plans for Firms program makes plans affordable and easy to manage.

A platform for today's CPA firms

Whether you have a retirement plan or are just getting started, you can create, manage and maintain your plan with ultimate ease via the AICPA 401(k) Plans for Firms program. It provides a customized solution tailored to your firm's needs, allowing you to:

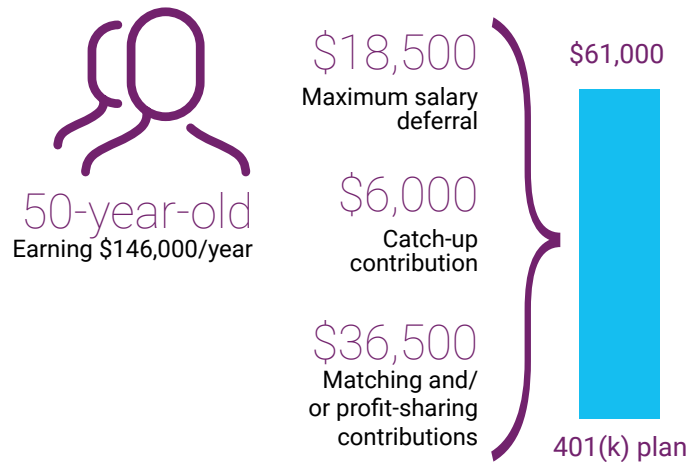
- Retain and attract qualified staff by offering vesting and matching options
- Offer powerful and affordable plans for \$100/month*
- Reduce taxable income and tax liability
- Maximize partner and key employee contributions
- Reduce administrative fees
- Include profit-sharing plans for even greater savings

*AICPA member firms with 1–50 employees

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AICPA 401(k) Plans for Firms

A 401(k) with a profit-sharing plan represents one of the most sound retirement options for business owners – with the ability to contribute more throughout the year than other plans on a pre- or post-tax basis, allowing for diverse tax strategy and better growth potential.



401(k) and profit-sharing benefits you will enjoy

Experience exceptional value with plans for \$100/month while still offering expansive investment options, 3(38) or 3(21) fiduciary support, tax benefits and more.

1. Investment flexibility

- Select from more than 9,500 investment options including companies such as, but not limited to, Dimensional Fund Advisors (DFA), Vanguard and Federated
- Work with your financial adviser or do it yourself

2. Plan expertise and convenience

- 401(k) experts create customized plans to maximize your firm's goals
- Easy on-site plan setup and enrollment
- A profit-sharing plan with multiple options

3. Fiduciary support options*

- 3(38) or 3(21) investment fiduciary services to minimize risk
- 3(16) plan administration assistance to help with day-to-day activities, including filing Form 5500

*Offered through a third party, additional fees may apply.

4. Enhanced services

- A dedicated, single point-of-contact 401(k) service specialist
- Industry-leading mobile application
- Employee-managed account to enhance the participant experience

5. Affordable administration pricing and satisfaction guarantee

- Exceptional \$100/month plans exclusively for AICPA firm members with 1-50 employees
- Rest assured with a six-month money-back service satisfaction guarantee on recordkeeping services
- Significantly reduced setup fee

Our partner — Paychex Retirement Services

The AICPA selected Paychex Retirement Services to bring you a best-in-class retirement program. With Paychex you receive:

- The national leader in 401(k) for seven straight years with more than 77,000 clients (*PLANSPONSOR* magazine)
- World-class service with a single point of contact
- Customized plan design
- Retirement plans for \$100/month for AICPA member firms with 1–50 employees

“Everything is handled for us, including record-keeping, calculations and broad plan administration. We are also proud to offer our employees a sound retirement program, so when it comes time for retirement, they have more than a gold watch.”

Karen Spinelli, CPA – Program User

President, Spinelli CPA

Plan for a financially healthy future.

Don't wait another day. Learn more about the AICPA 401(k) Plans for Firms program and the many benefits the plans offer your firm and employees. For more information:

Call 877.264.2615. Visit aicpa.org/Retirement