

INTRODUCING THE ARIZONA TECHNOLOGY COUNCIL 401(k) MULTIPLE EMPLOYER PLAN

By joining the Arizona Technology Council 401(k) Multiple Employer Plan, you can provide an outstanding plan, save money, reduce your fiduciary liability and spend less time on administrative tasks.

Arizona Technology Council 401(k) Multiple Employer Plan

Member Benefits

- No Annual Audit
- Cost savings on the investments
- No individual Form 5500 reporting
- Minimal plan maintenance
- Flexible plan features, including safe harbor, Roth and profit sharing
- Customizable 401(k) plan design options involving eligibility, matches, vesting schedules and more
- Reduce your fiduciary responsibilities

How?

The Arizona Technology Council 401(k) Multiple Employer Plan, from a government reporting standpoint, is treated like one large plan. The end result for you is a retirement plan with competitive investments, outstanding service, and someone else doing the legwork.

Strength in Numbers

When you utilize the Arizona Technology Council 401(k) Multiple Employer Plan, you have all the advantages and flexibility of a stand-alone plan sponsor, but avoid the expenses, fiduciary liabilities and administrative headaches associated with sponsoring a stand-alone plan.

Let us handle the paperwork for you

By participating in the Arizona Technology Council 401(k) Multiple Employer Plan, virtually all administrative tasks can be offloaded to the plan.

Tasks that can be shifted may include:

- Administrative responsibilities
- Employee eligibility tracking
- Distribution
- Processing
- Plan compliance
- Non-discrimination testing
- Annual reporting
- Participant education/enrollment

The result is more time for you to focus on running your business!

FOR FURTHER INFORMATION

Please contact the financial advisor for the Arizona Technology Council 401(k) Multiple Employer plan below:

Michael DiGrazia, CIMA®, CFP®
Senior Institutional Consultant
Director
Legacy Wealth Management

Legacy Wealth Management
8501 N Scottsdale Road, Ste 165
Phoenix, AZ 85253

(480) 573-2198
michael.digrazia@legacy-wm.net

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Legacy Wealth Management is a separate entity from WFAFN.



401(k) Plan Features

Value

AZTC offers a comprehensive retirement plan solution for businesses that provides simple implementation and administration at a low cost to the business owner. The plan enables you to offer a high quality retirement benefit that relieves the much of the administrative burden from your team. The plan also helps minimize fiduciary responsibilities to the plan sponsor and plan fiduciaries.

Perhaps most importantly, the plan can help you not only attract and retain quality employees but encourage those employees to make good decisions today that will move them closer to their retirement goals tomorrow.

Investment Options

- A comprehensive variety of investment options
- Institutional or CIT share class funds
- Legacy Wealth Management – 3(21) Investment Fiduciary
- Open Architecture line up including active and passive index

Comprehensive Administration

- Plan design and set-up consultation
- Delivery of annual regulatory and eligibility notices
- Enrollment and education
- Retirement education meetings
- 5500 preparation by AZTC
- Audit Preparation by AZTC

Company Costs

Set-up (one time cost)	\$750
Payroll Bridge	\$50 per payroll
Annual Fee	\$750

Participant Costs

Annual Administration	\$16 per participant
-----------------------	----------------------

Asset Expenses

Asset charge	0.60%
--------------	-------