Onboarding 401KInABox

Seamless • Affordable • Simple

What's in the 401KInABox?

Click a number to jump to a page

Welcome to **401KInABox**!

We're excited to have you onboard with us. Our goal is to make your onboarding process as easy as possible by supporting you every step of the way.

Established in 2017, the 401KInABox platform commits to a seamless, affordable, and simple online service process for clients and advisors. Recordkeeping, payroll, and administration services are all fully integrated. That means 401KInABox provides a 100% bundled experience, allowing retirement plans to be managed with ease.

Included in this package are guides for signing up with 401KInABox. The guides assist Financial Advisors to create an advisor account, Financial Advisors to create a Client account, and New Clients to create an account.

If you have any questions about the guides or need further assistance with signing up, feel free to contact us by email or phone located here.

Happy Onboarding!

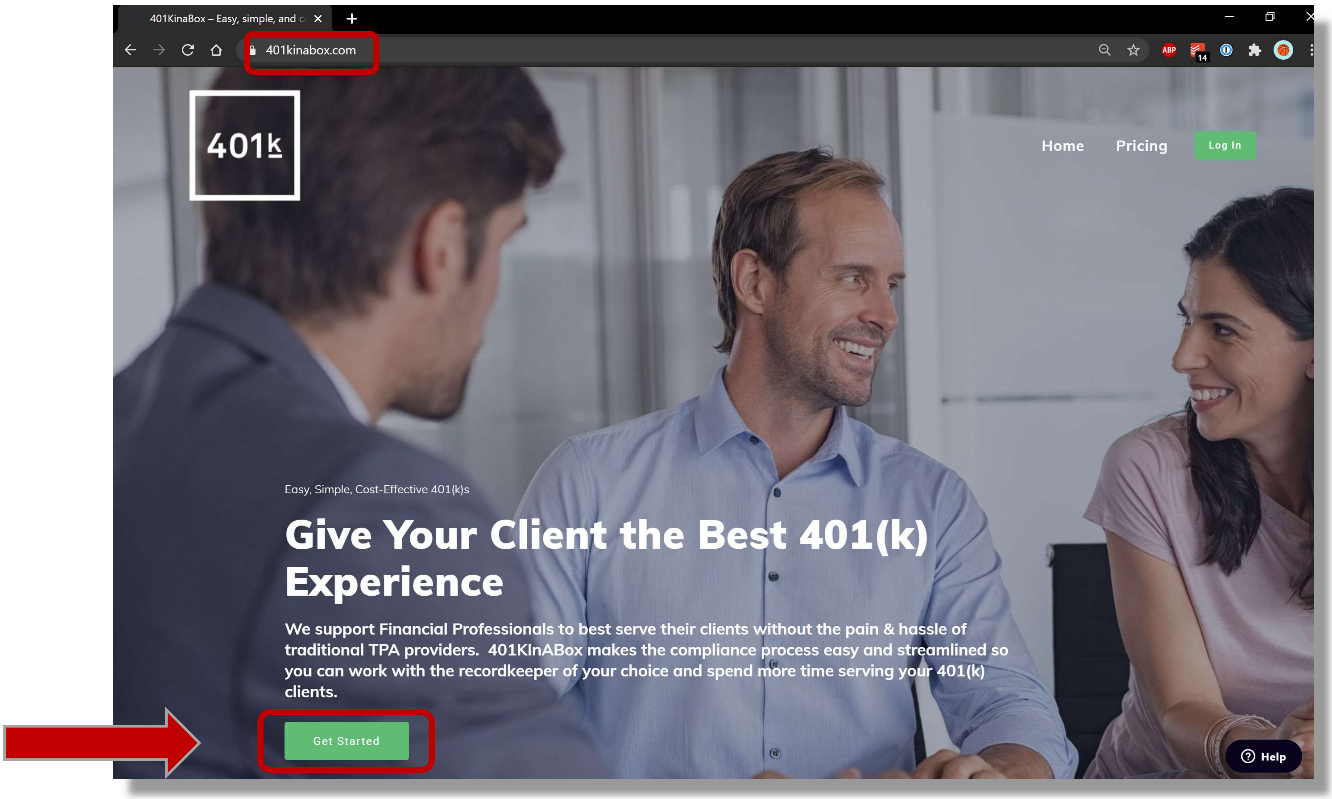
How to:

Create a Financial Advisor Account for 401KInABox

A step by step guide

Step 1

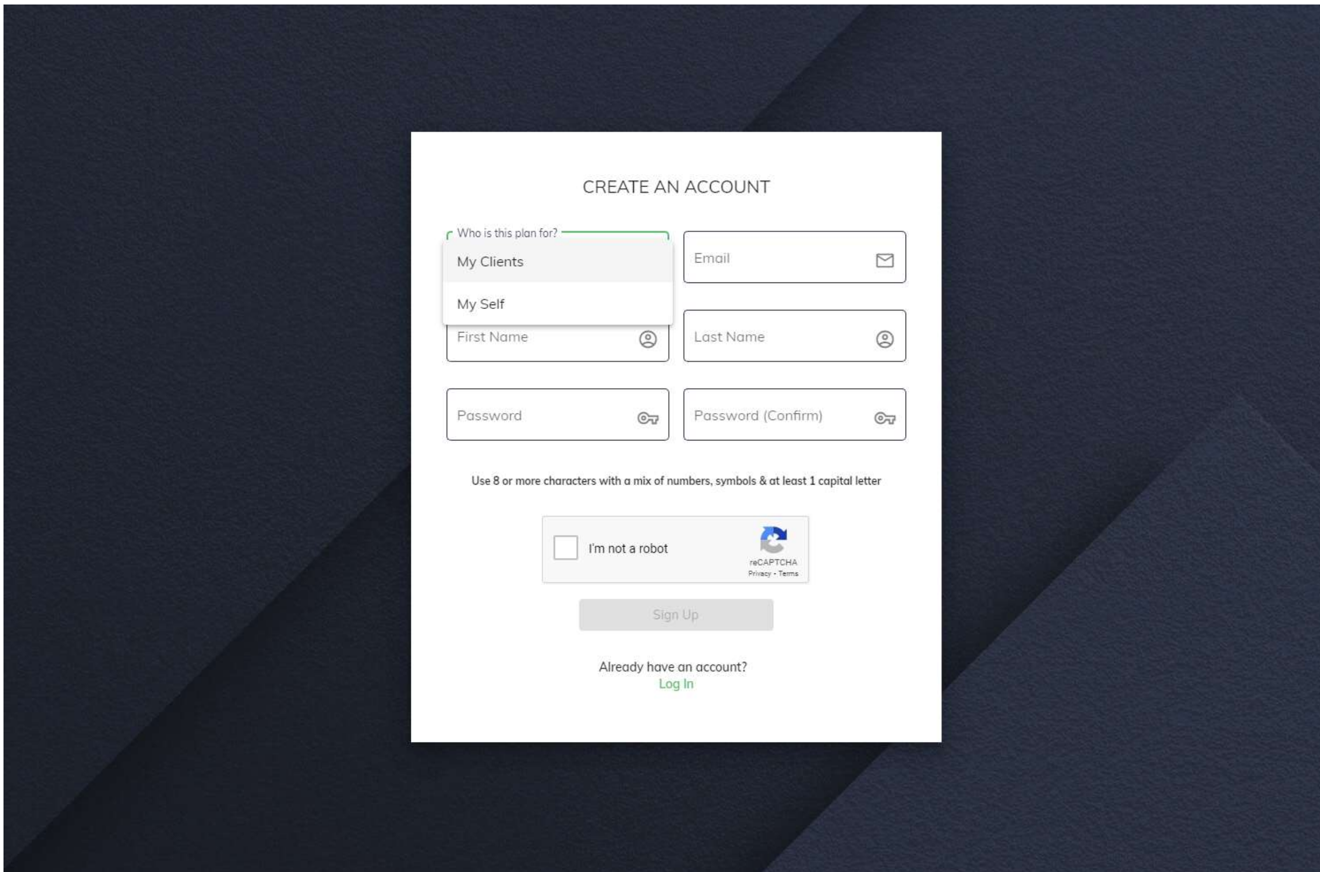
Go to https://www.401kinabox.com and click on the Get Started Button



Step 2

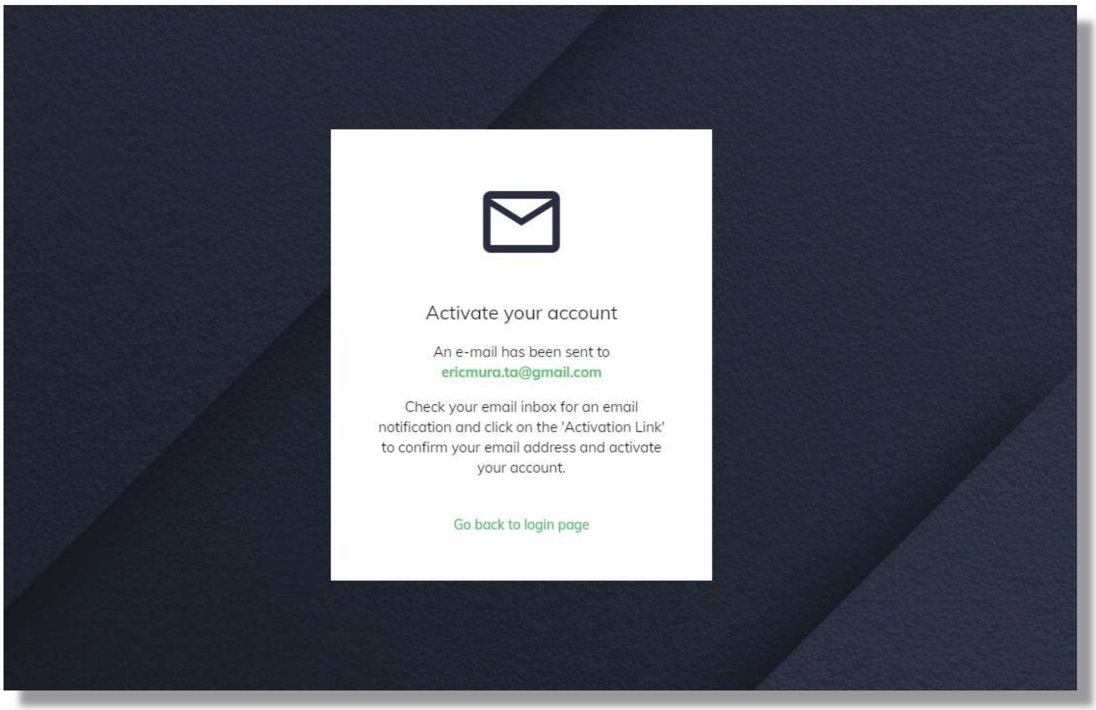
In the first section 'Who is This Plan For?', select the option 'My Clients'.

Fill in the remaining fields and click Sign Up.

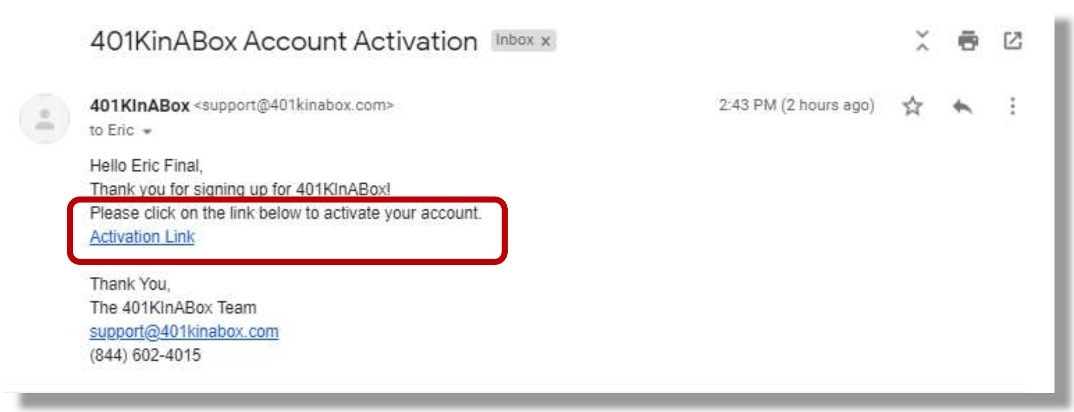


Step 3

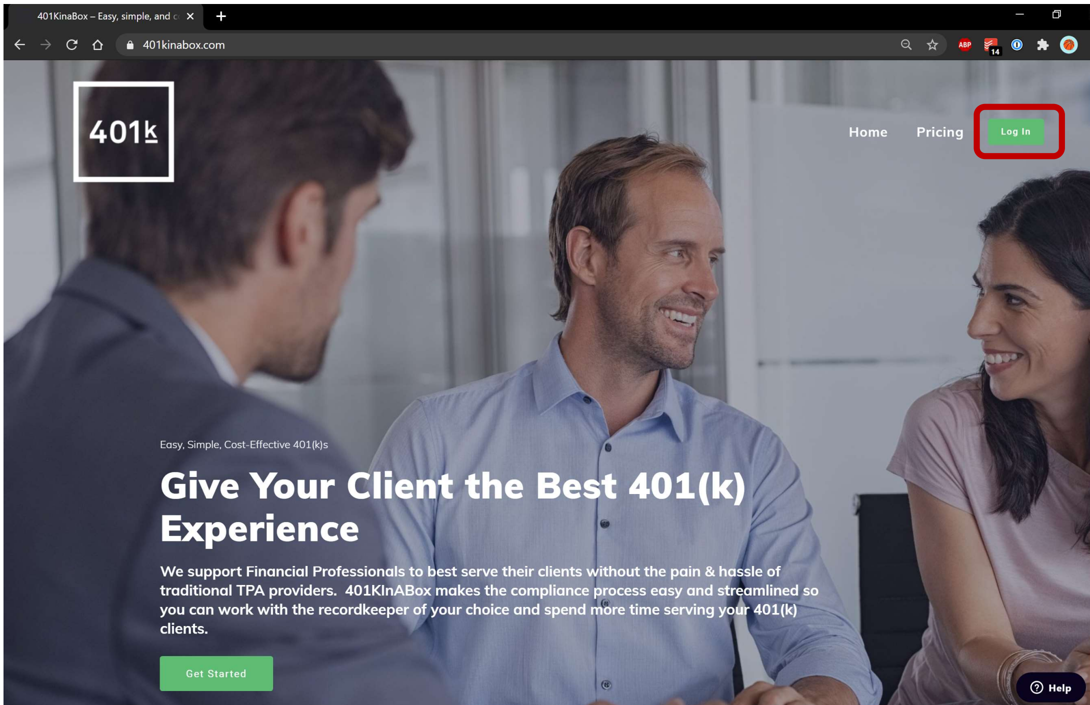
An Account Activation email will be sent the address used to create your financial advisor account.

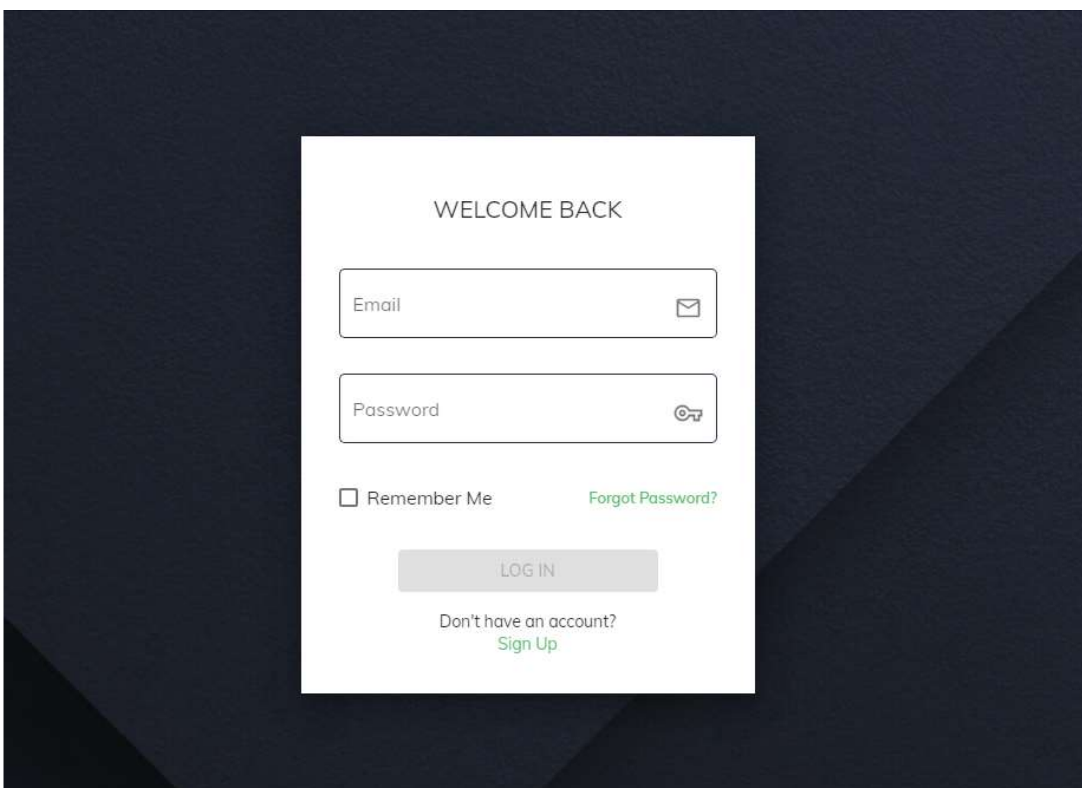


Please click on the 'Activate Email' link in your email to activate your account.



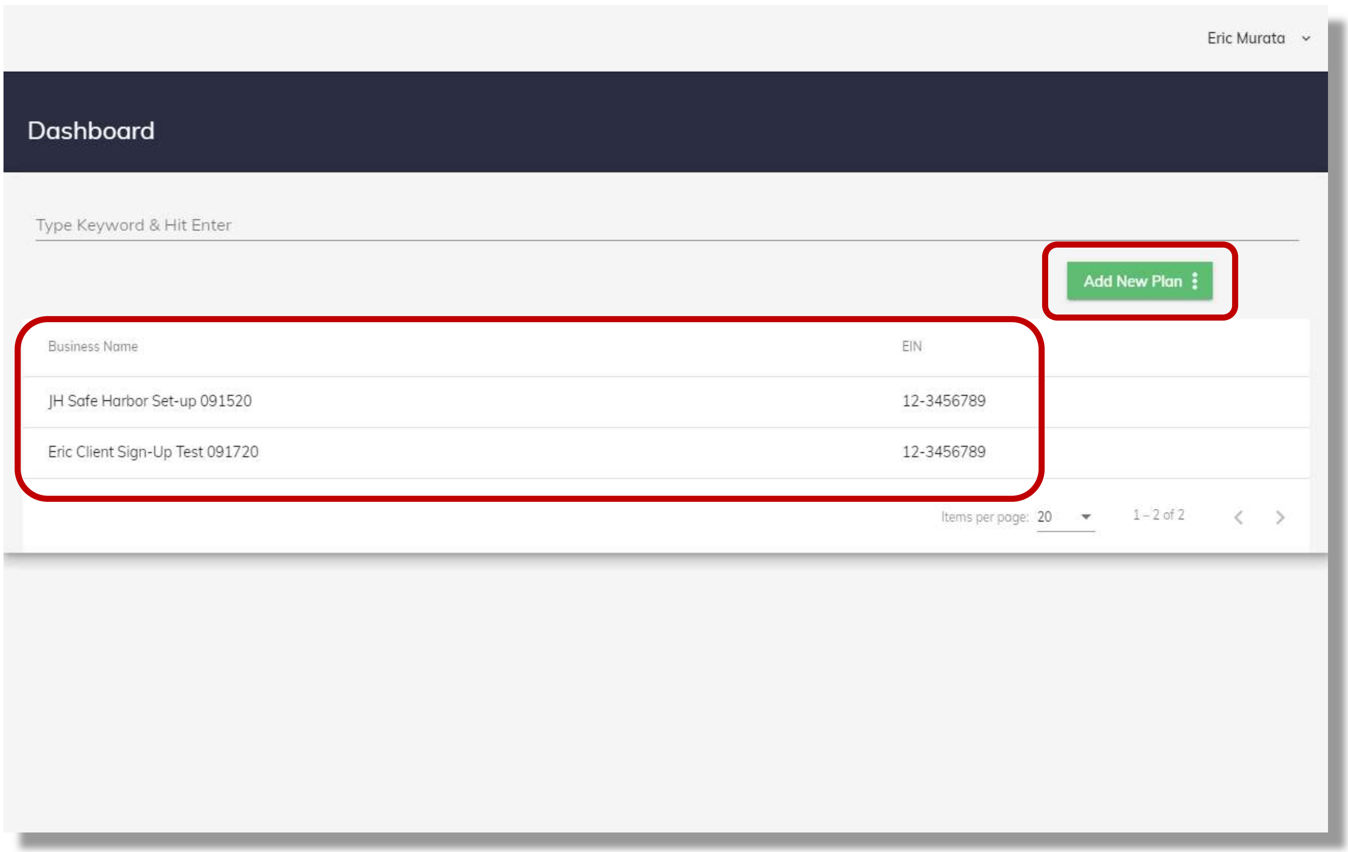
Return to the Login page at https://www.401kinabox.com. Enter your e-mail and password and Sign In.





Step 4

You are now logged in as an advisor. You may [1] set up a plan for a client by clicking on 'Add New Plan' or [2] view a current mutual client by clicking on the business name entry.



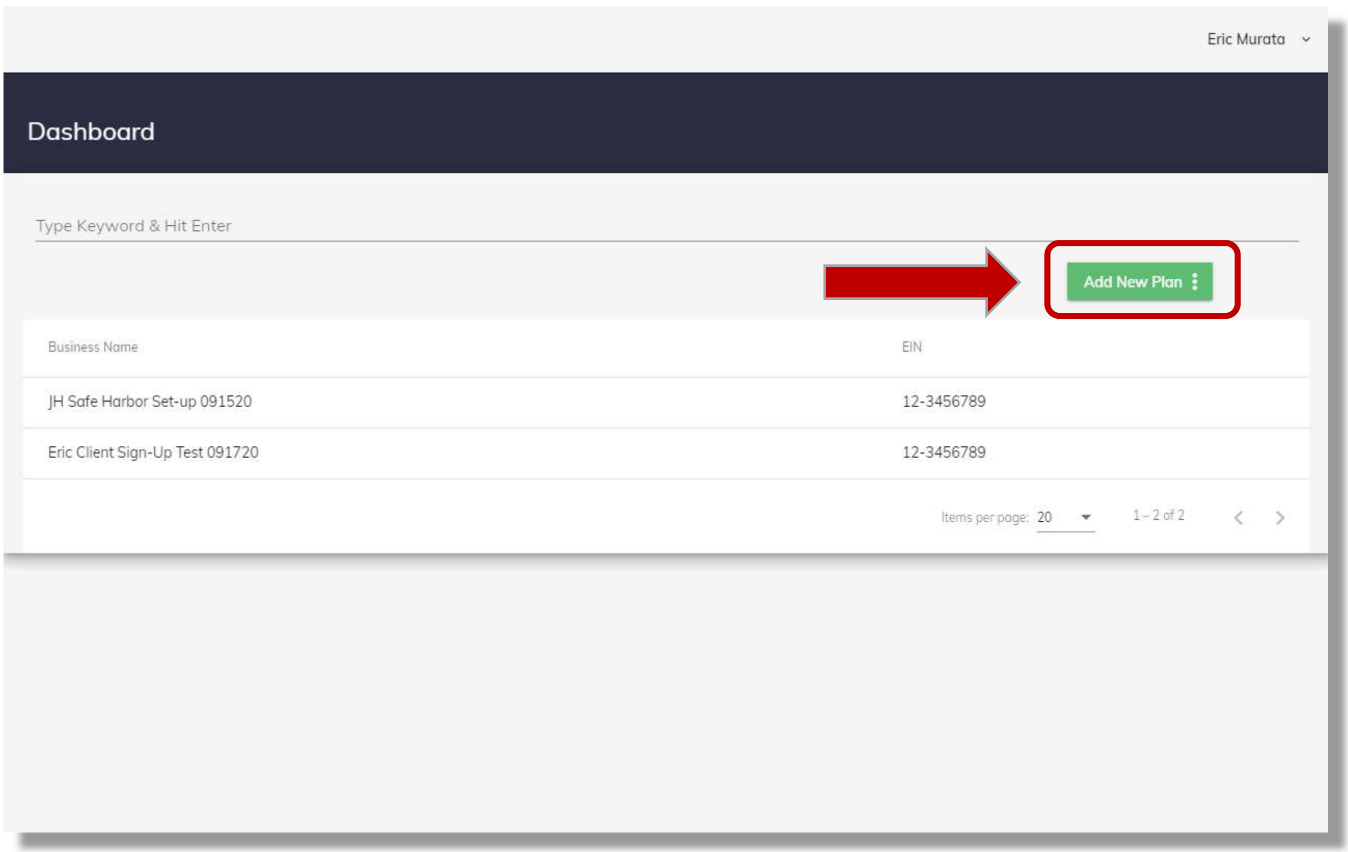
How to:

Set up a Plan for a Client in 401KInABox

A step by step guide for a Financial Advisor

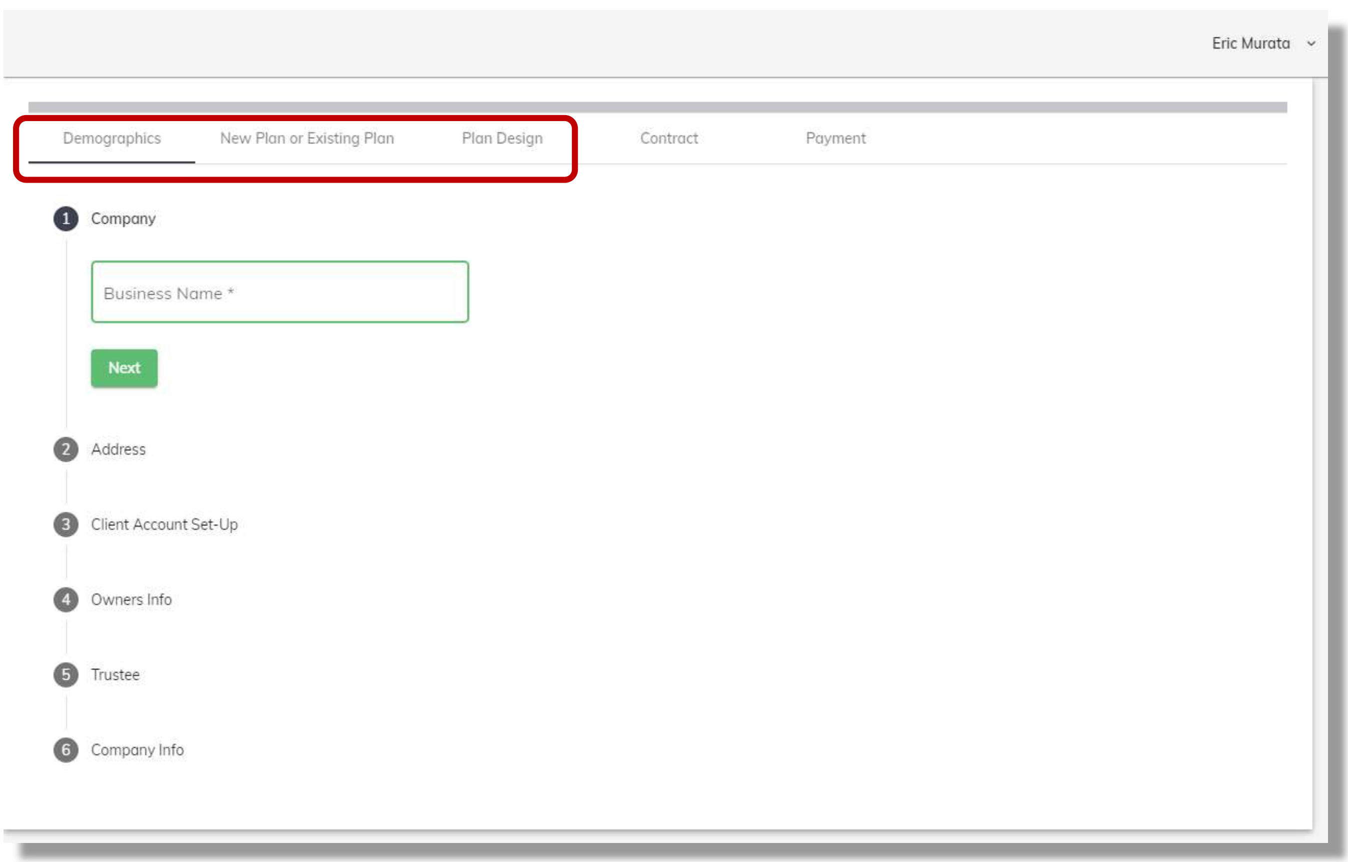
Step 1

Log into your Financial Advisor account and on the Dashboard screen, click on the 'Add New Plan' and select the type of plan you would like to start from the drop-down menu .



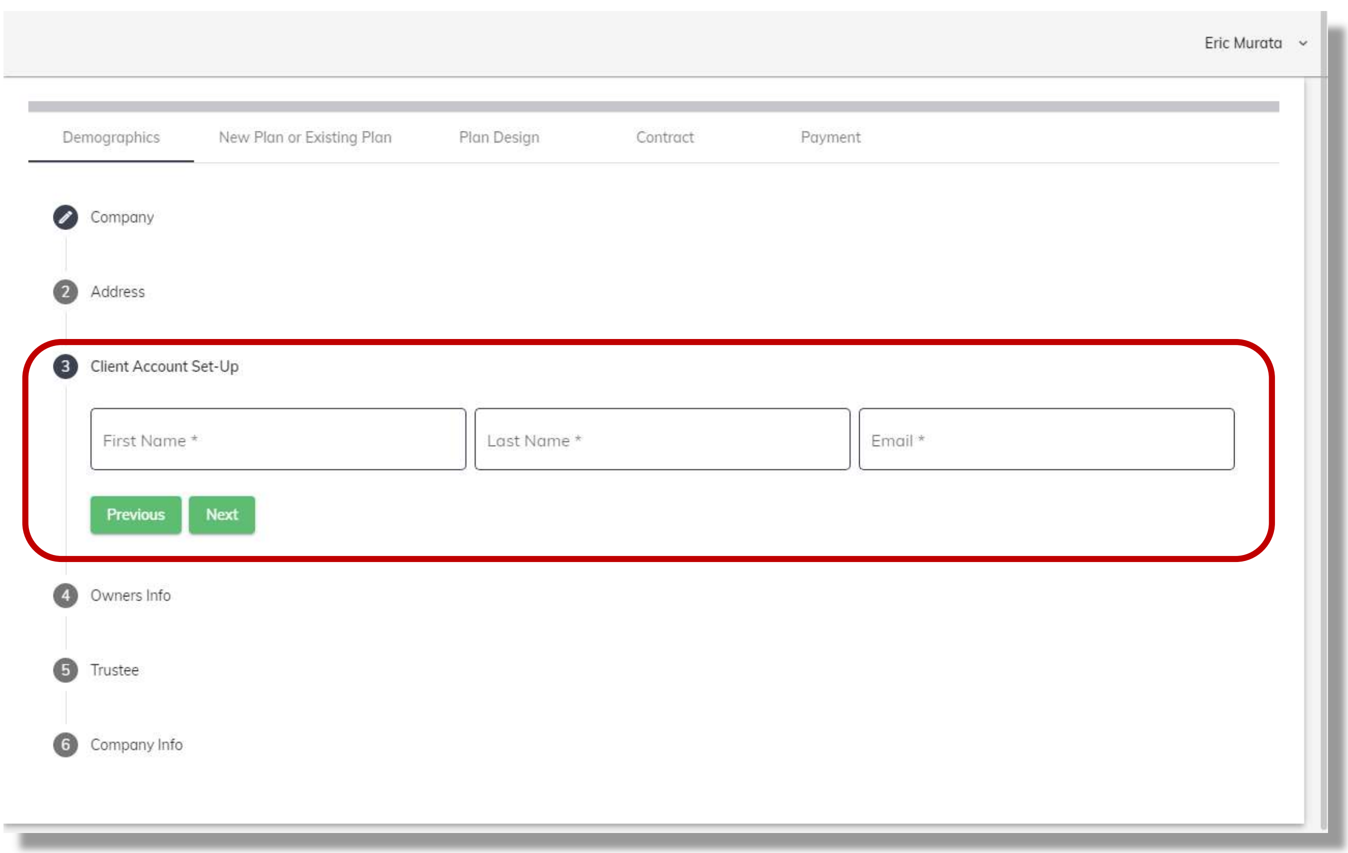
Step 2

Complete section by filling in the client information and click Save & Next at the end of each section to save the progress of your work. By pre-filling this sign-up process, you will be creating an account for your client (see Step [3]). Complete each section except for the ' Contract' & ' Payment' sections, which will be finalized by your client when they log into their account and complete the sign up process.



Step 3

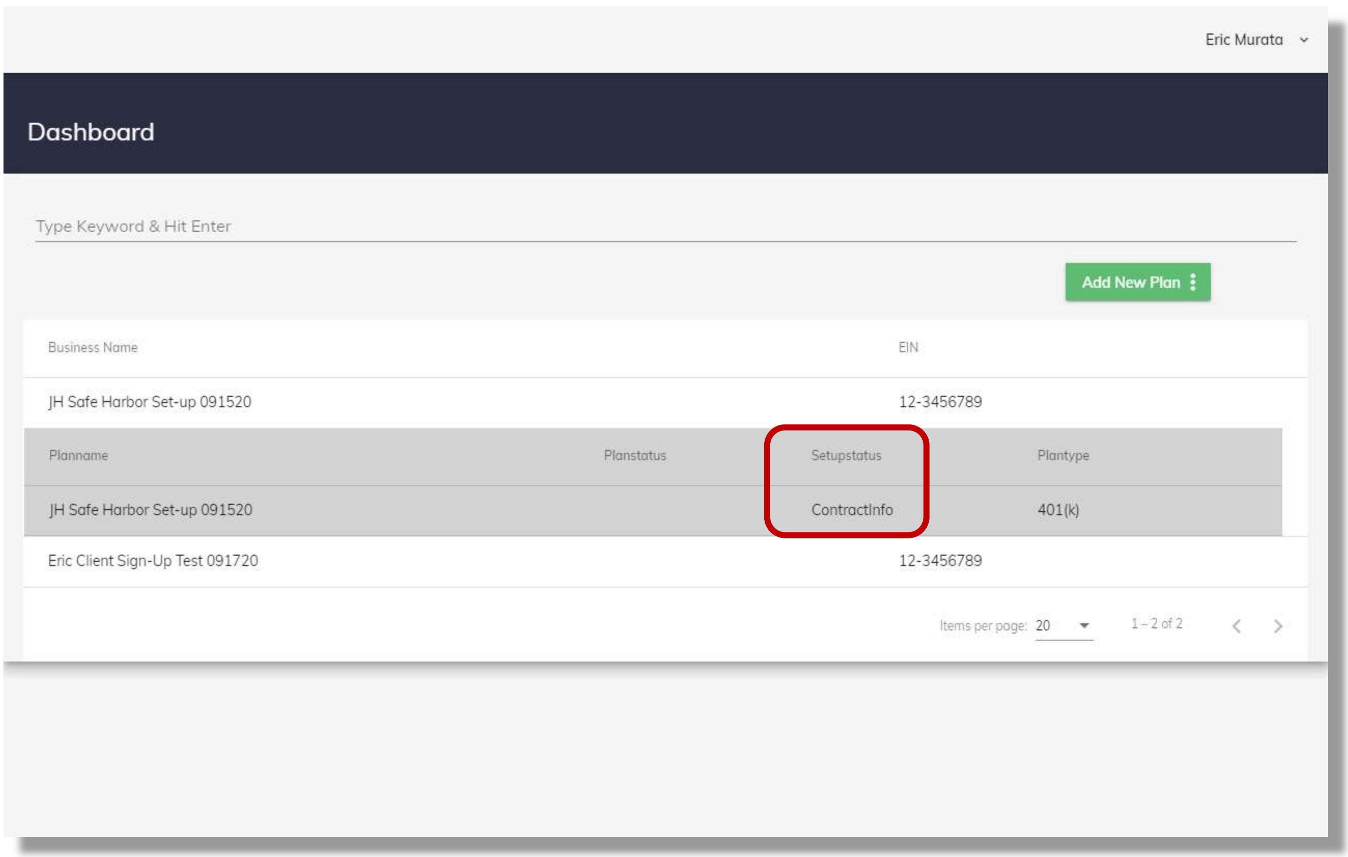
Upon completing the 'Client Account Set-Up' section in the 'Demographics' category, the application will automatically send a welcome & account activation e-mail to the e-mail address you specify. The e-mail will include a client log-in and auto-generated password, allowing them to log in and complete the sign-up process. Your client will complete the sign-up process you pre-filled by providing their signature and remitting payment (see the Client Sign-Up Guide for more information).



Step 4

After finishing pre-filling the sign-up process, the client name & Plan will appear on the Financial Advisor Dashboard.

The status of the Set-Up process for each client can be tracked on the Dashboard.



How the:

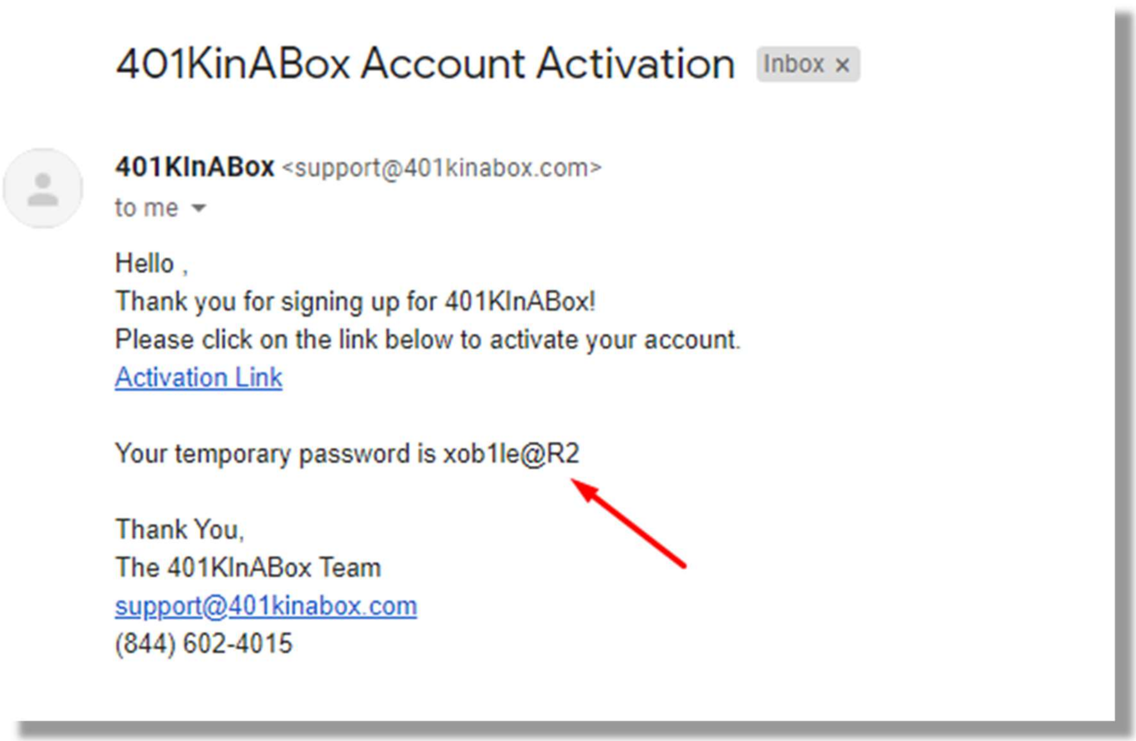
Plan Sponsor Completes the Sign-Up for 401KInABox

A step by step guide for New Clients

Step 1

The application will automatically send the Plan Sponsor an account activation e-mail once the Financial Advisor begins the Plan set-up process.

Once the email is received, the Plan Sponsor will activate the account by clicking on the Activation Link and log into 401KInABox using the email address and default password.


401KinABox Account Activation Inbox ×

401KInABox <support@401kinabox.com>
to me

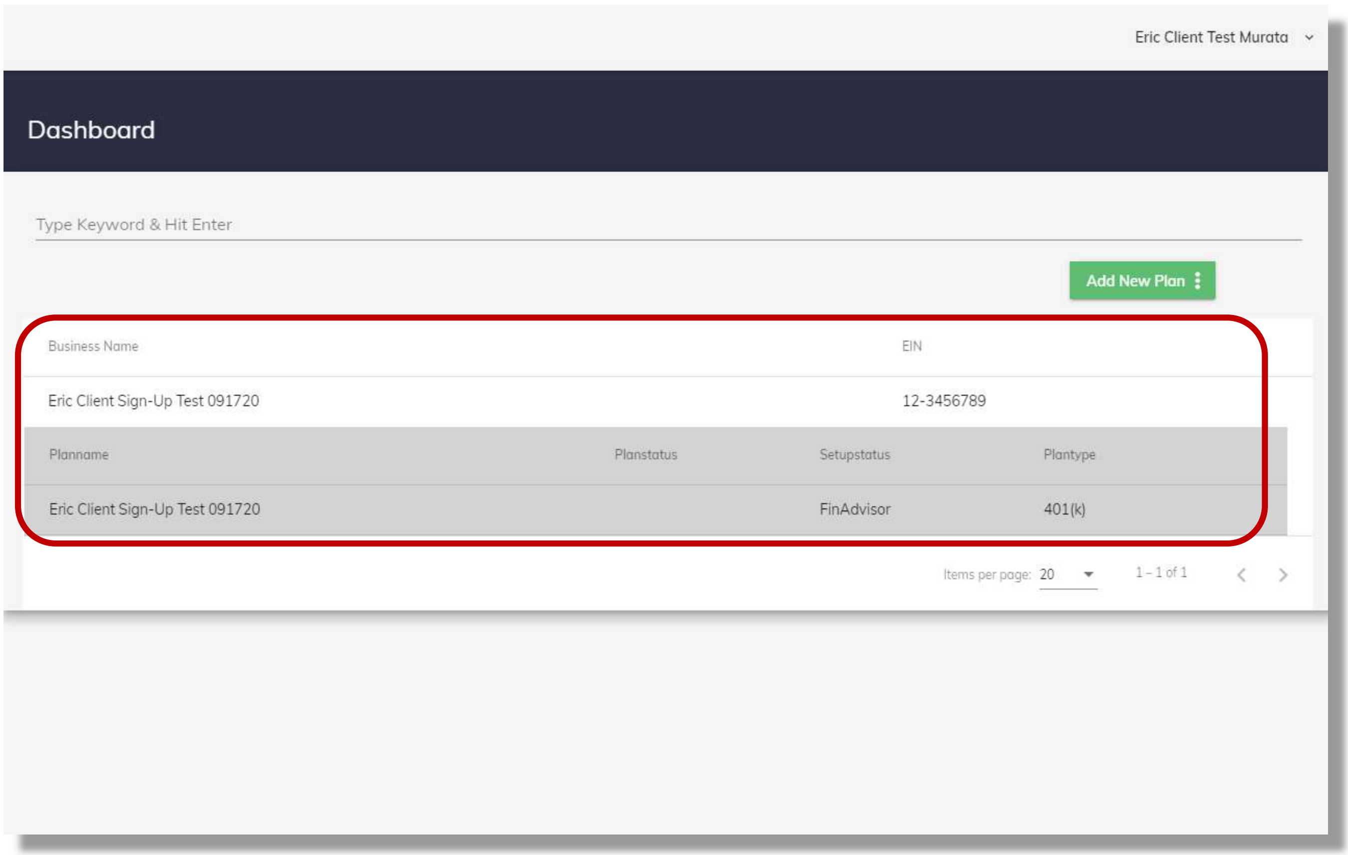
Hello ,
Thank you for signing up for 401KInABox!
Please click on the link below to activate your account.
Activation Link

Your temporary password is xob1le@R2

Thank You,
The 401KInABox Team
support@401kinabox.com
(844) 602-4015

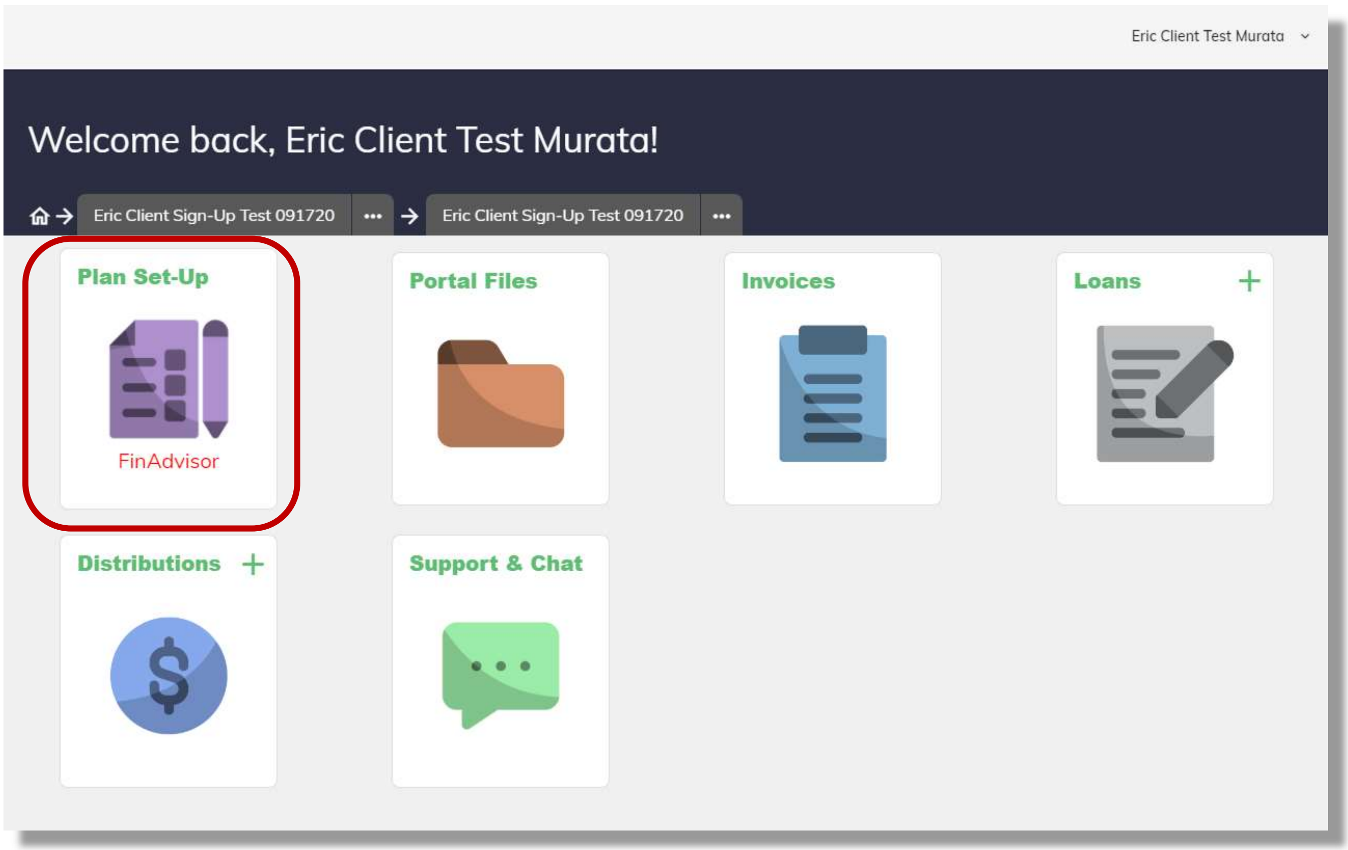
Step 2

Once logged in, you will be able to see your plan. Click on the Plan to navigate to the Dashboard.



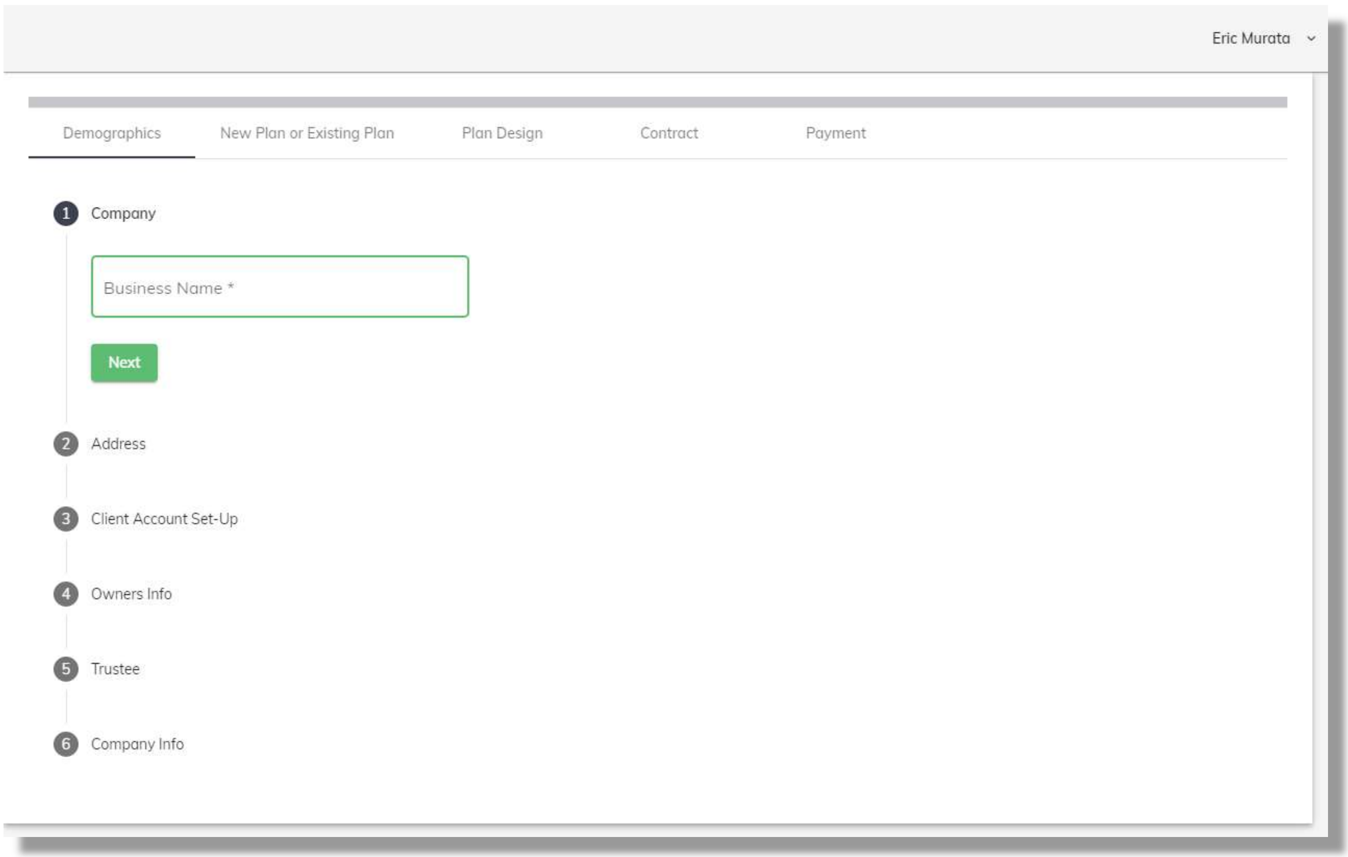
Step 3

On the Dashboard, click on the Plan Set-Up Tile to view the pre-filled sign up process started by the Financial Advisor.



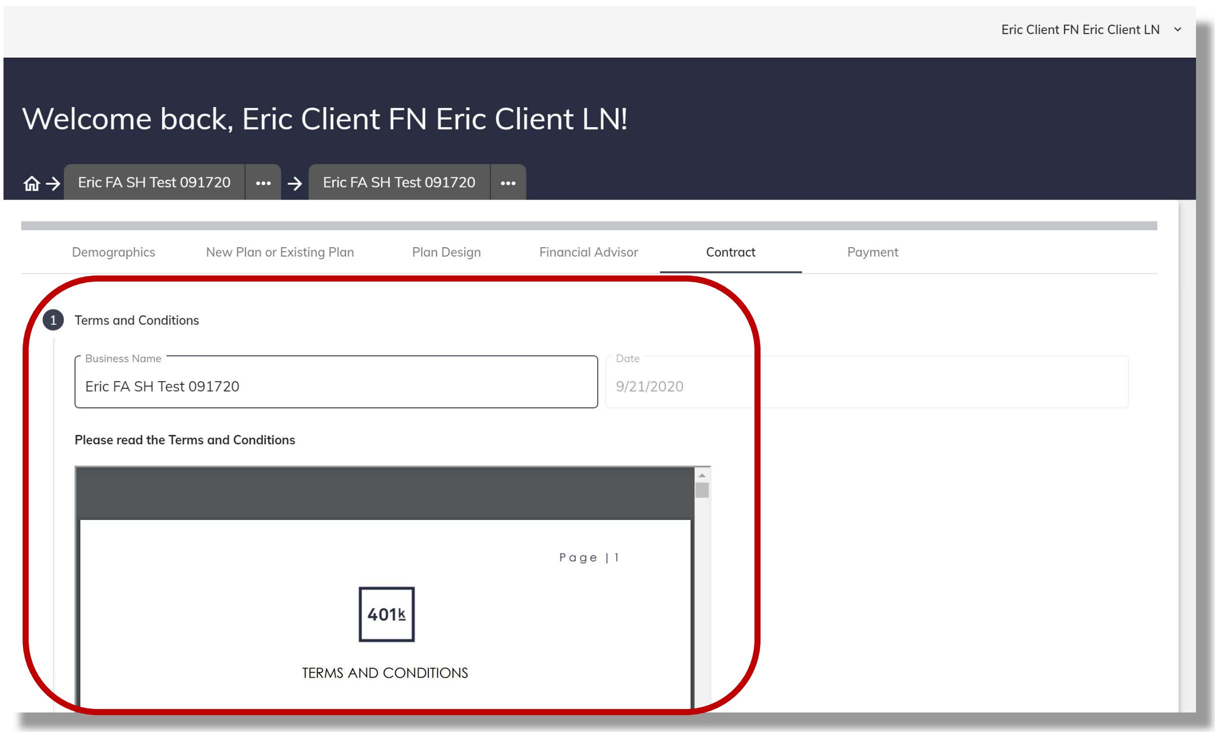
Step 8

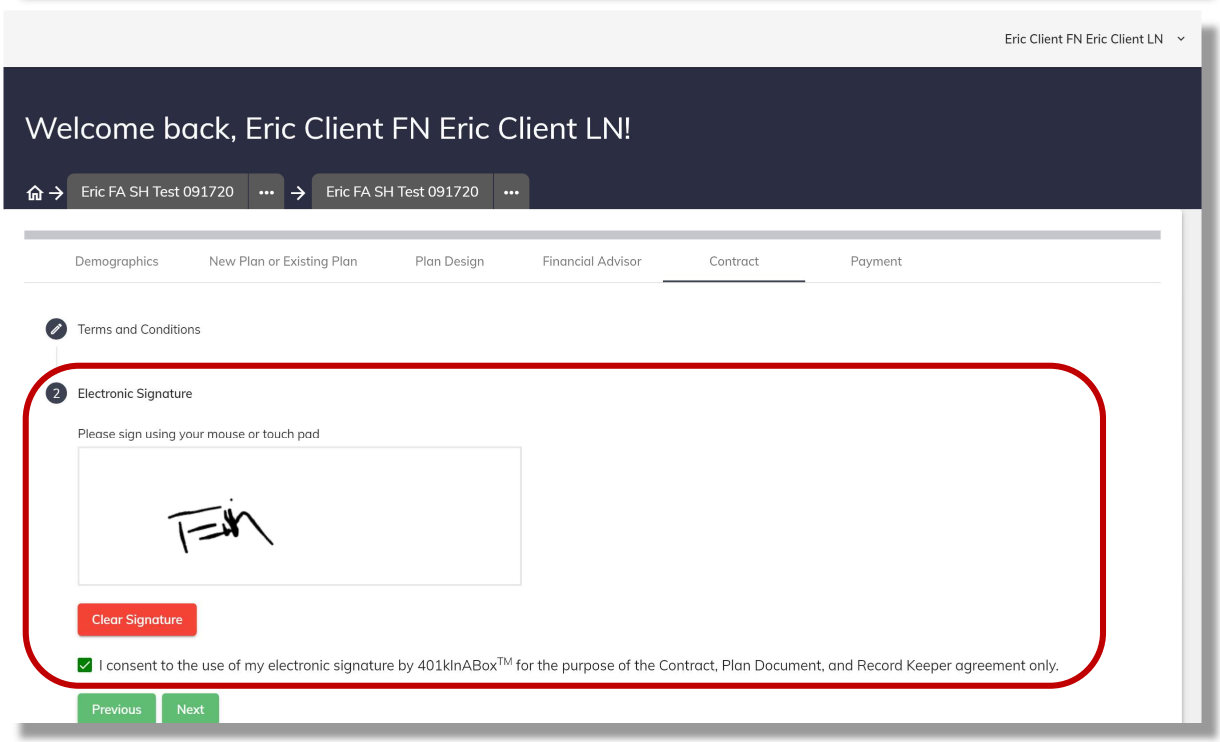
Review the sections completed by the Financial Advisor for accuracy and proceed to the Contract and Payment sections.



Step 9

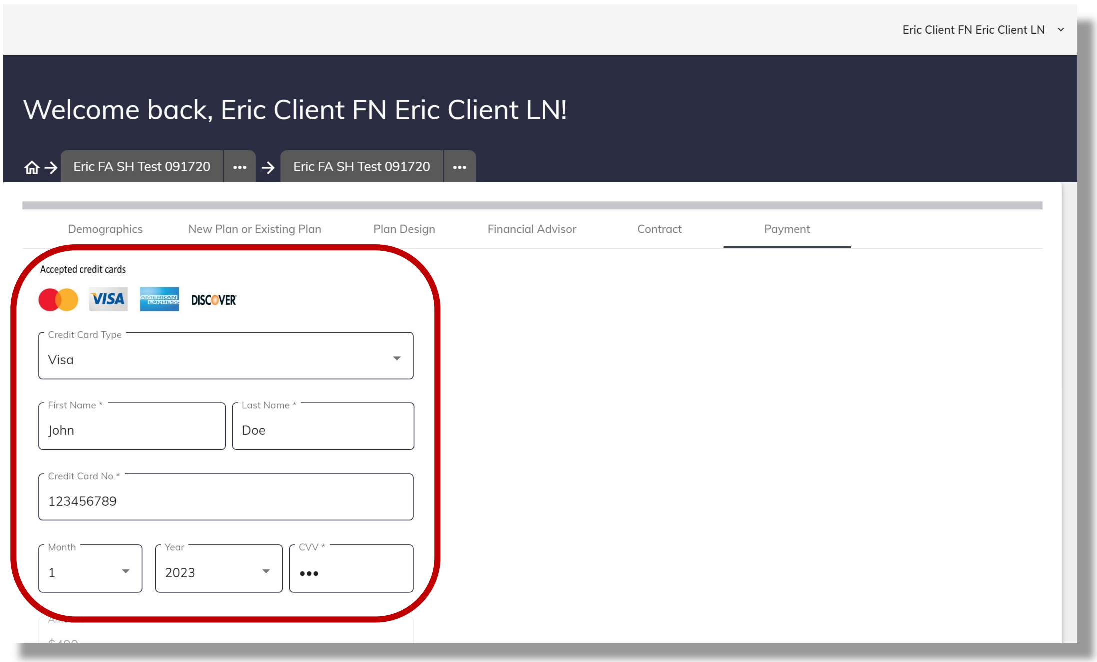
In the Contract section, read & agree to the Terms & Conditions and sign





Step 10

Remit Payment. Once payment is remitted, 401KInABox will begin work on the plan documents.



Step 11

Once the plan documents are generated, the client will receive an e-mail with instructions on how they may log-in and retrieve them from 401KInABox. They will have a few pages from the adoption agreement to sign to execute the agreement.

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For additional help & resources

success.401kinabox.com

Email

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Call

(844) 602-4015