

401k

Setting Up Your Plan



Seamless • Affordable • Simple

What's in the 401KInABox?

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Welcome Message

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Step by step guide showing how to review the plan information

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Complete Sections

Complete the Contract & Payment section to finish the sign-up process.

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Connect with Us

Website, social media, and contact information

Welcome to **401KInABox!**

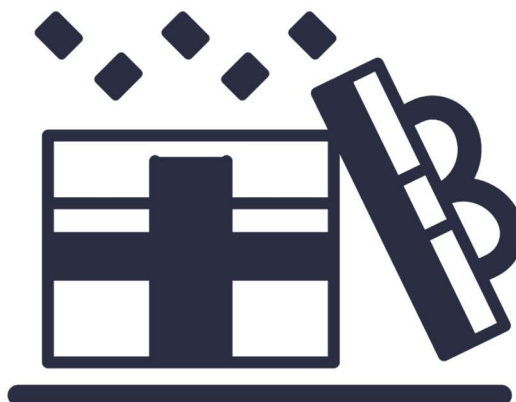
We're excited to have you onboard with us. Our goal is to make your onboarding process as easy as possible by supporting you every step of the way.

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:

Complete Your Plan Sign-Up for 401KInABox

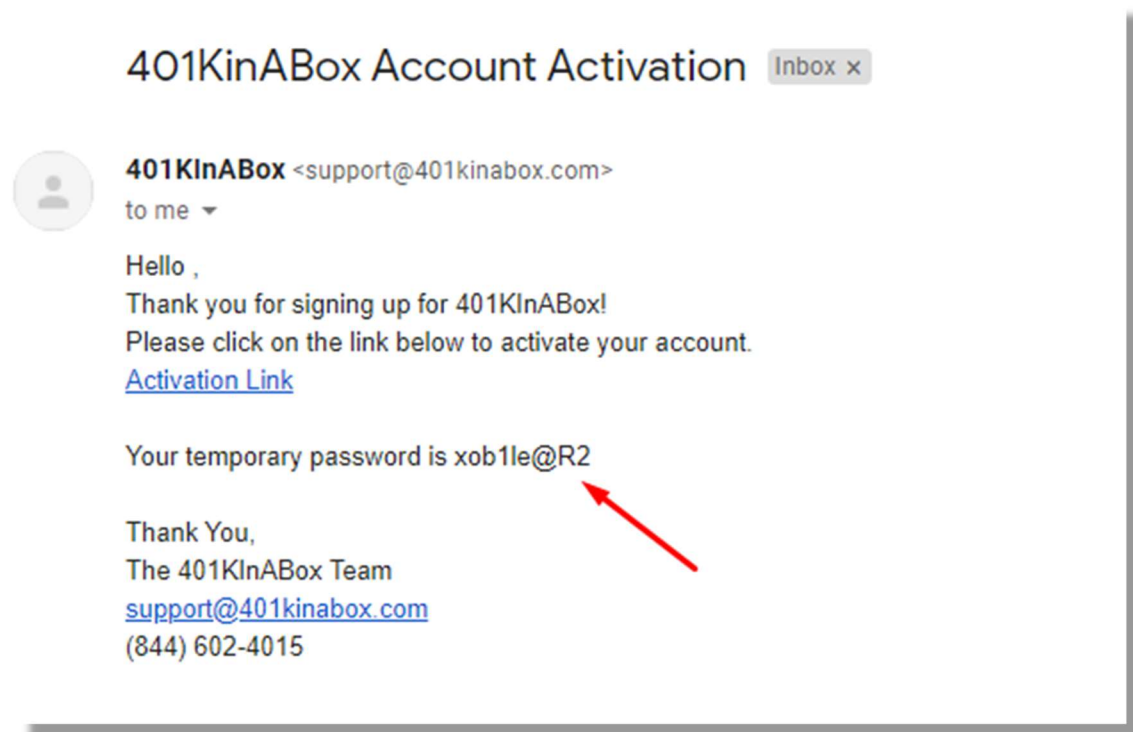
**A step by step guide for
New Clients**



Step 1

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

Once the email is received, please activate the account by clicking on the **Activation Link** and log into 401KinABox using the email address and default password.



Step 2

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

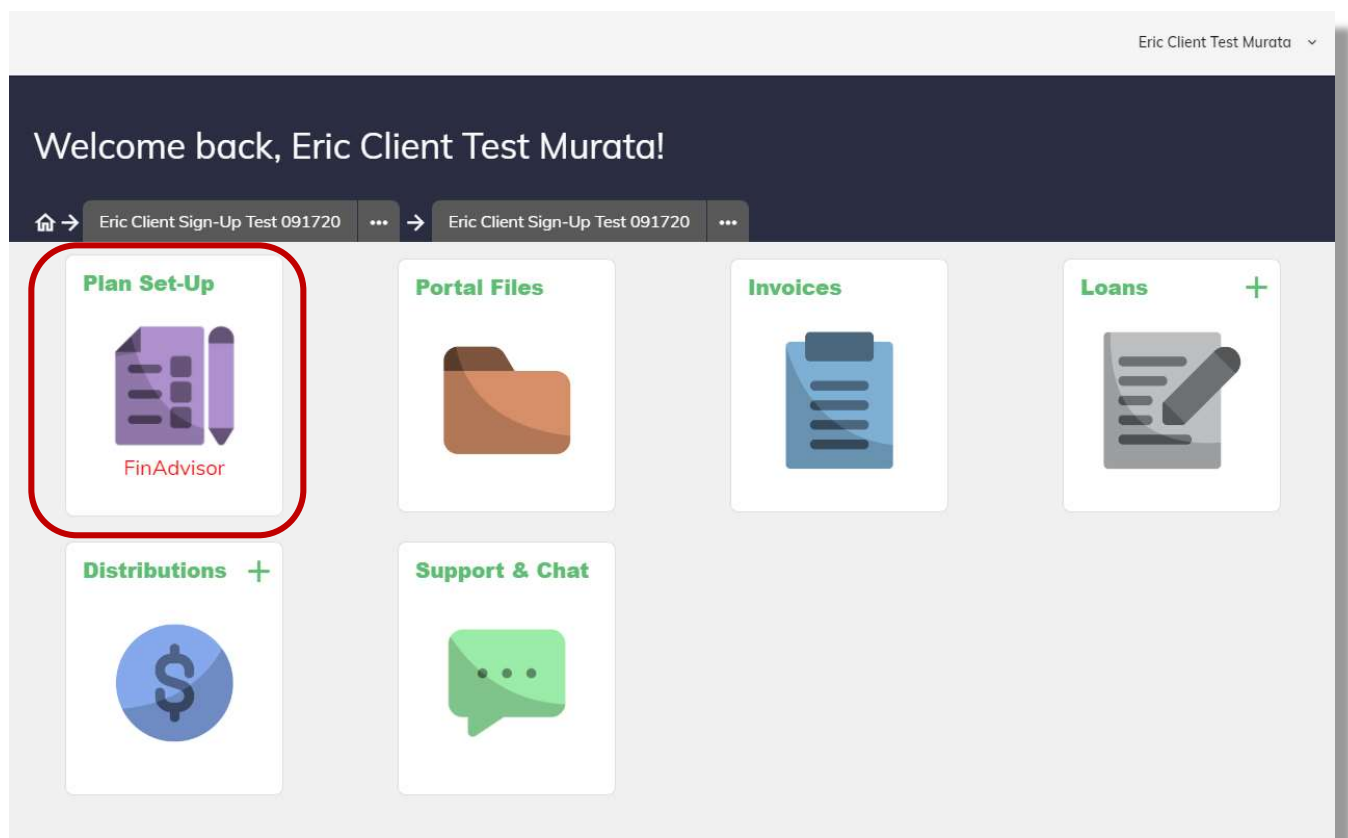
The screenshot shows a user dashboard for "Eric Client Test Murata". At the top right, the user's name is displayed with a dropdown arrow. Below this is a dark blue header with the word "Dashboard". Underneath is a search bar with the placeholder text "Type Keyword & Hit Enter". To the right of the search bar is a green button labeled "Add New Plan" with a dropdown arrow. Below the search bar is a table with two columns: "Business Name" and "EIN". The first row of the table is highlighted with a red rounded rectangle and contains the text "Eric Client Sign-Up Test 091720" under "Business Name" and "12-3456789" under "EIN". Below this is a table with four columns: "Planname", "Planstatus", "Setupstatus", and "Plantype". The first row of this table is also highlighted with a red rounded rectangle and contains the text "Eric Client Sign-Up Test 091720" under "Planname", "FinAdvisor" under "Setupstatus", and "401(k)" under "Plantype". At the bottom right of the table, there is a pagination control showing "Items per page: 20" with a dropdown arrow, and "1 - 1 of 1" with left and right navigation arrows.

Business Name	EIN
Eric Client Sign-Up Test 091720	12-3456789

Planname	Planstatus	Setupstatus	Plantype
Eric Client Sign-Up Test 091720		FinAdvisor	401(k)

Step **3**

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



Step 4

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

Eric Murata ▾

Demographics New Plan or Existing Plan Plan Design Contract Payment

1 Company

Business Name *

Next

2 Address

3 Client Account Set-Up

4 Owners Info

5 Trustee

6 Company Info

Step 5

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

Eric Client FN Eric Client LN

Welcome back, Eric Client FN Eric Client LN!

Eric FA SH Test 091720 → Eric FA SH Test 091720

Demographics New Plan or Existing Plan Plan Design Financial Advisor **Contract** Payment

1 Terms and Conditions

Business Name: Eric FA SH Test 091720 Date: 9/21/2020

Please read the Terms and Conditions

401k

TERMS AND CONDITIONS

Page | 1

Eric Client FN Eric Client LN

Welcome back, Eric Client FN Eric Client LN!

Eric FA SH Test 091720 → Eric FA SH Test 091720

Demographics New Plan or Existing Plan Plan Design Financial Advisor **Contract** Payment

2 Terms and Conditions

2 Electronic Signature

Please sign using your mouse or touch pad

Clear Signature

I consent to the use of my electronic signature by 401kInABox™ for the purpose of the Contract, Plan Document, and Record Keeper agreement only.

Previous Next

Step 6

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

Eric Client FN Eric Client LN

Welcome back, Eric Client FN Eric Client LN!

Eric FA SH Test 091720 → Eric FA SH Test 091720

Demographics New Plan or Existing Plan Plan Design Financial Advisor Contract **Payment**

Accepted credit cards

Mastercard VISA American Express DISCOVER

Credit Card Type
Visa

First Name * John Last Name * Doe

Credit Card No * 123456789

Month 1 Year 2023 CVV * ...

Step 7

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.

Connect with Us



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For additional help & resources

success.401kinabox.com



Email

sales@401kinabox.com



Call

(844) 602-4015