Setting Up Your Plan

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:

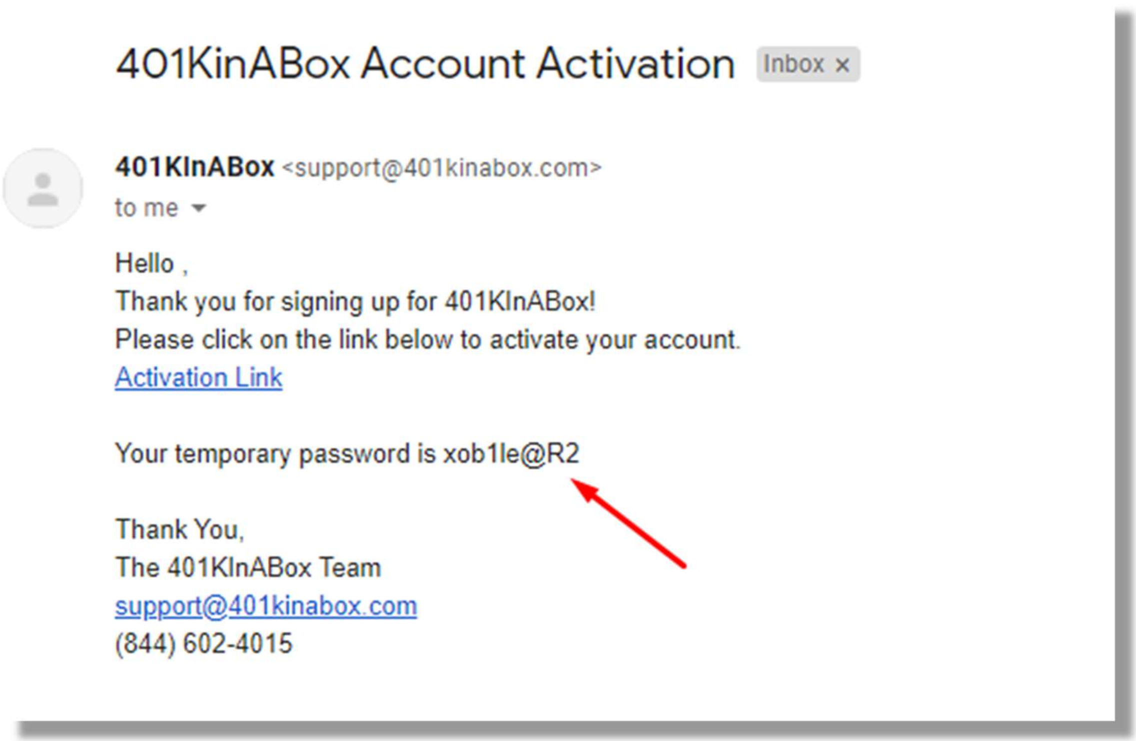
Complete Your Plan Sign-Up for 401KInABox

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.



401KinABox Account Activation Inbox ×

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

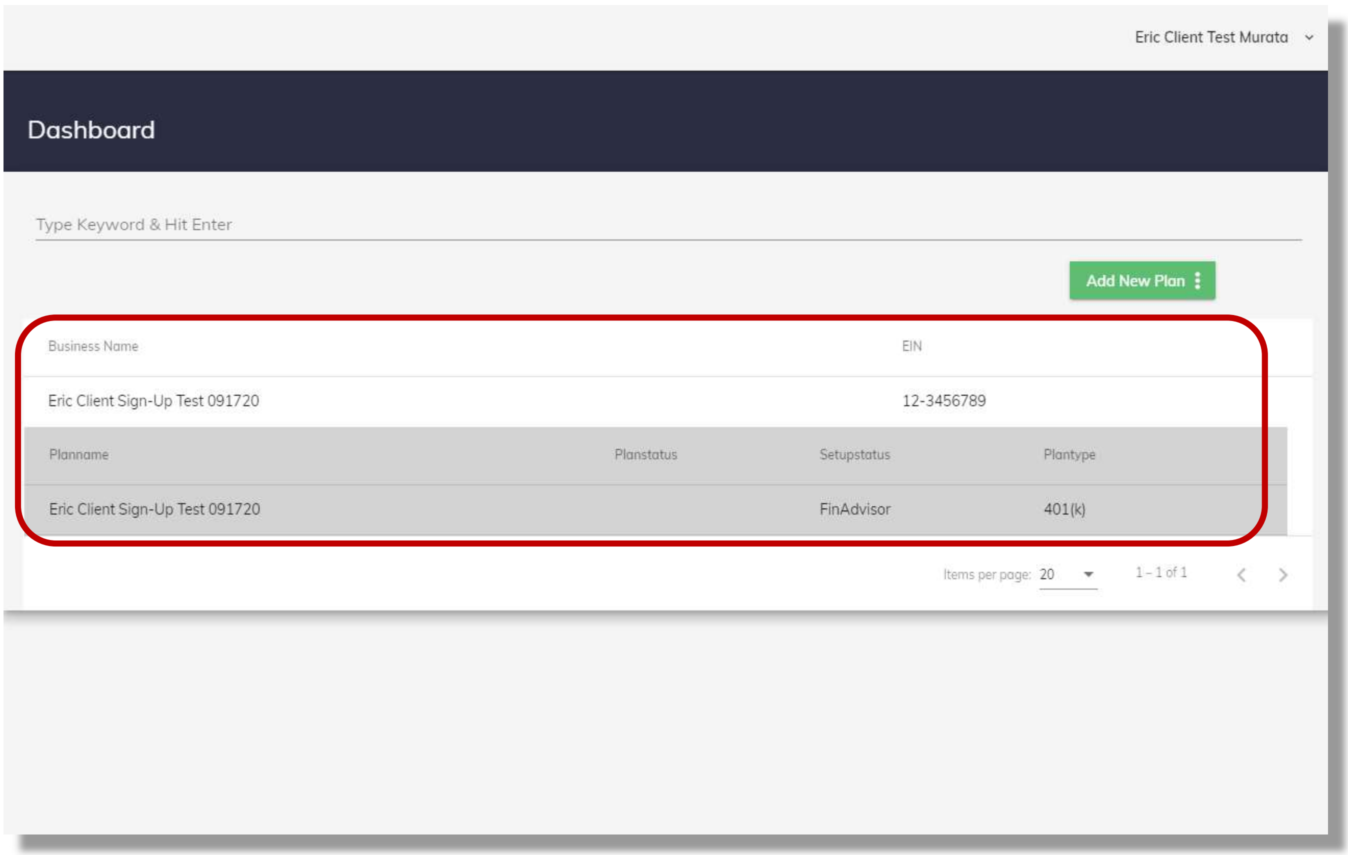
Hello ,
Thank you for signing up for 401KInABox!
Please click on the link below to activate your account.
Activation Link

Your temporary password is xob1le@R2

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

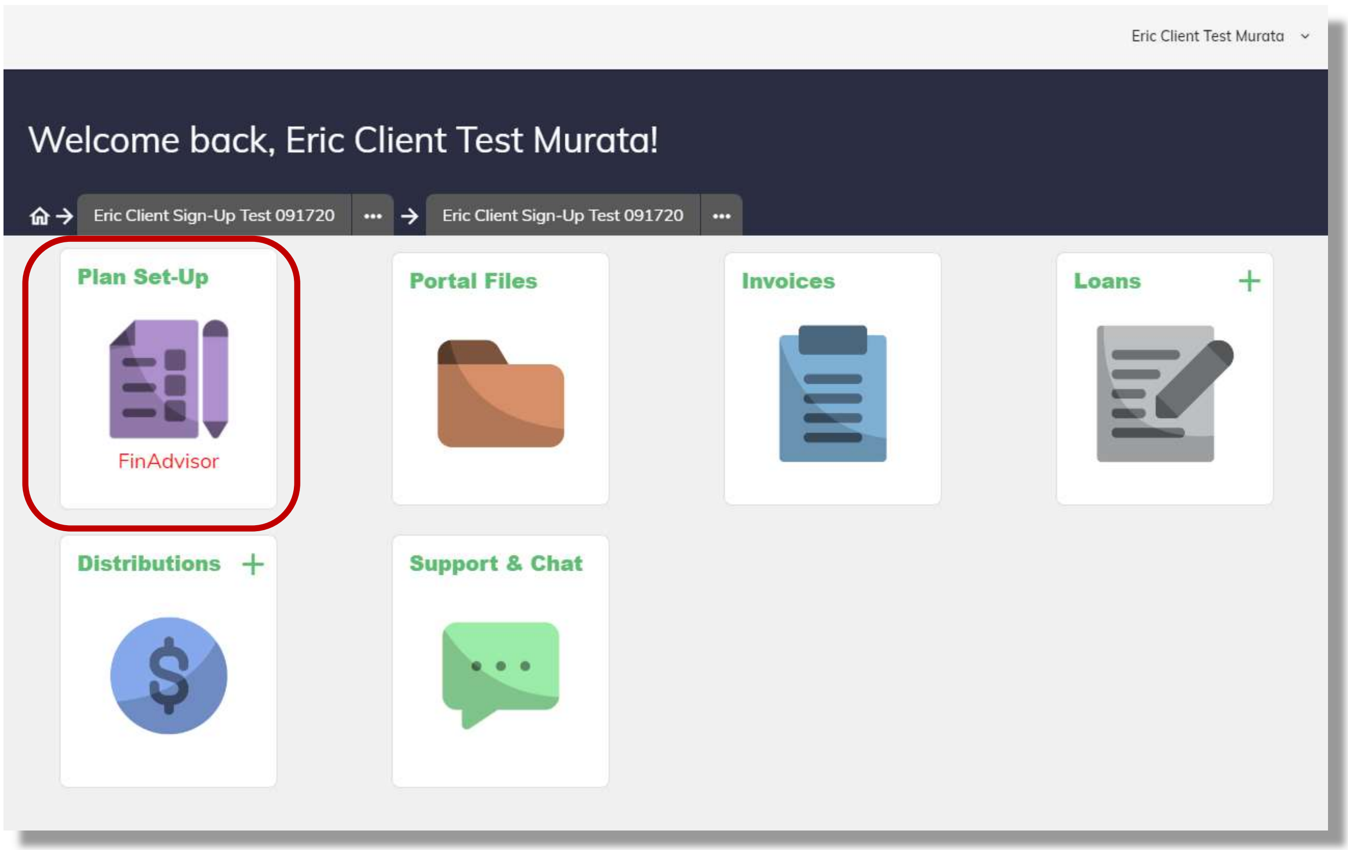
Step 2

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



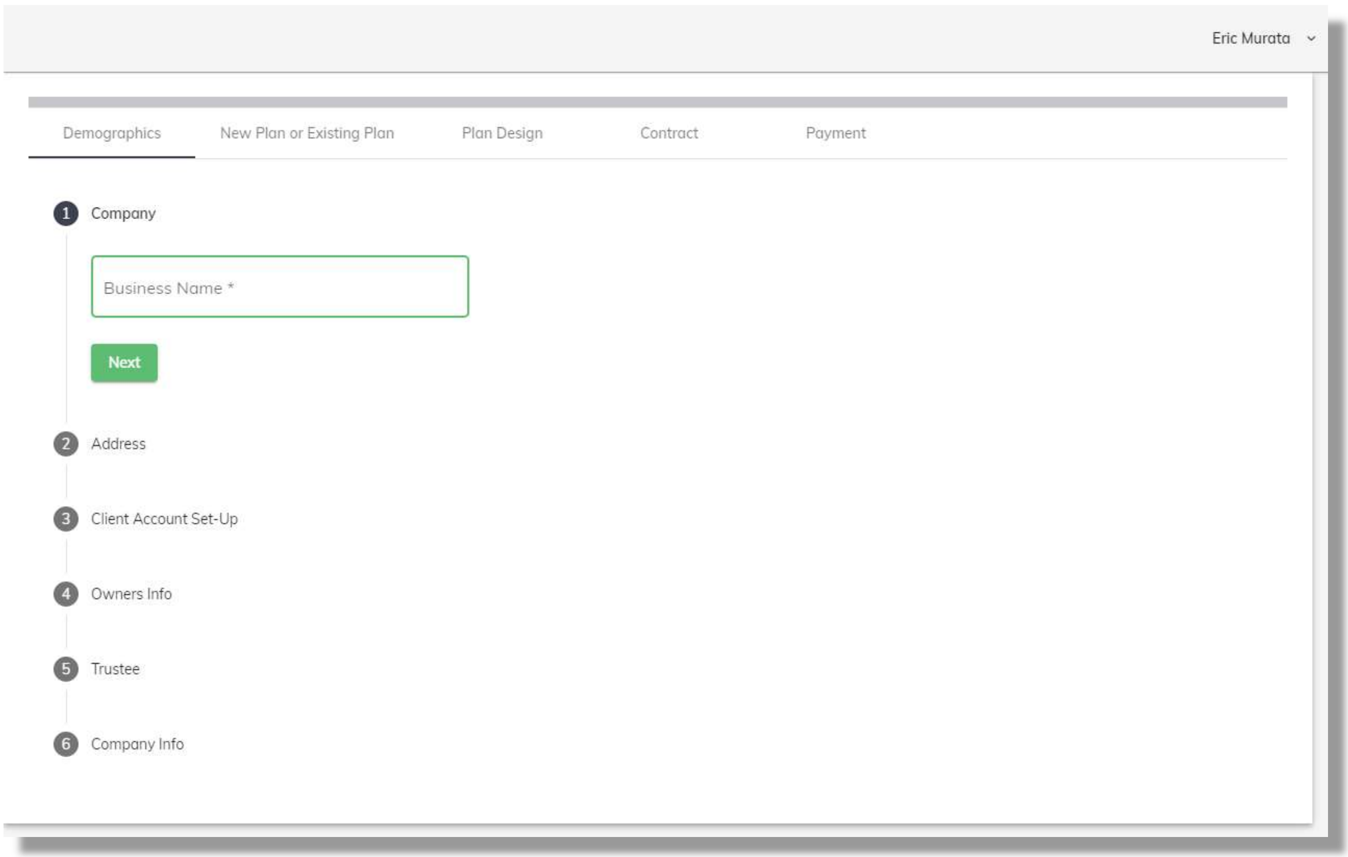
Step 3

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



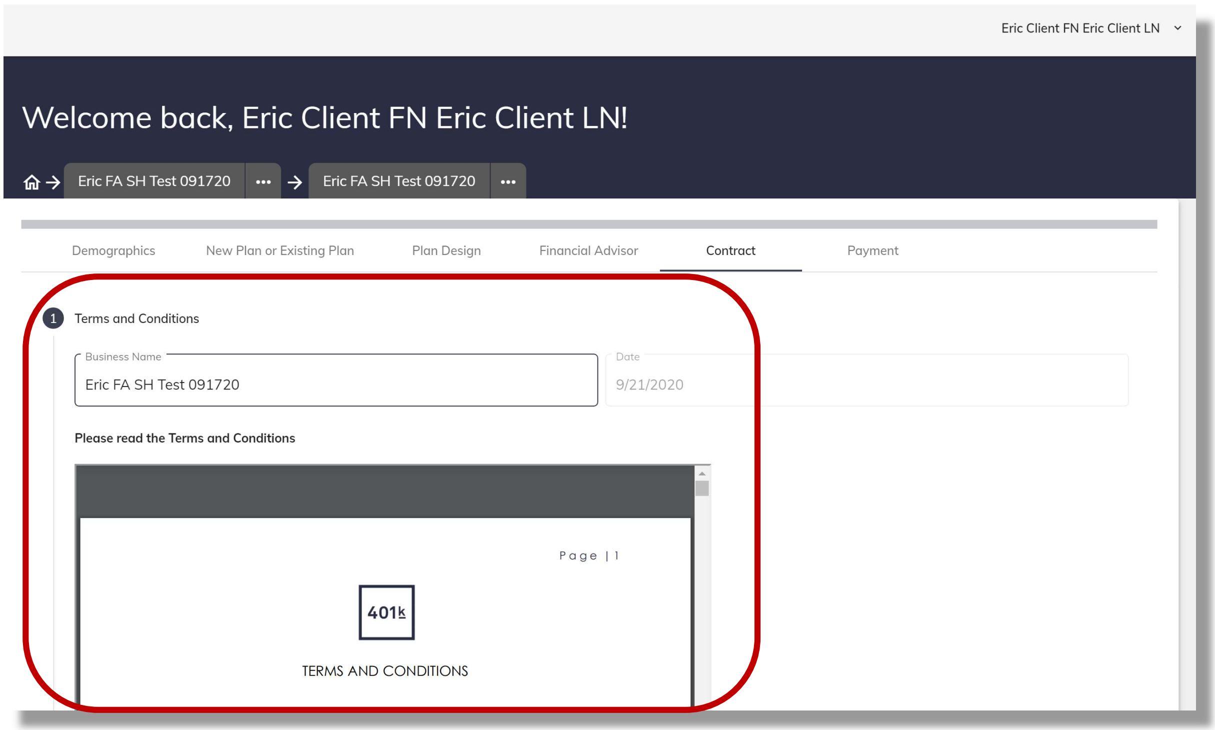
Step 4

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



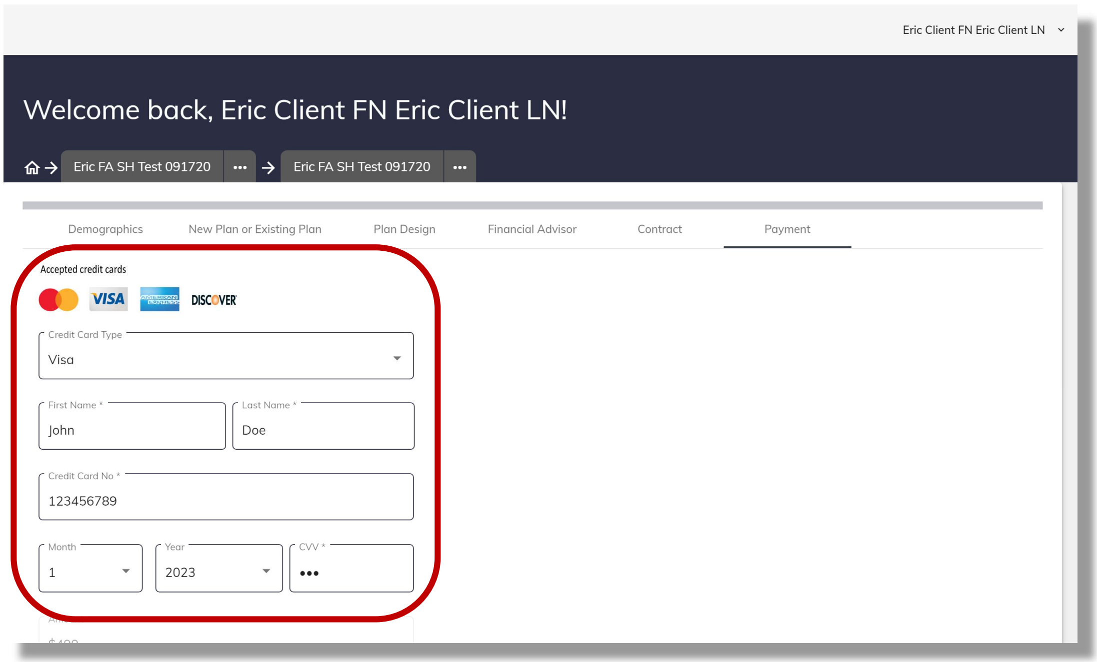
Step 5

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



Step 6

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



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

Follow us

LinkedIn

For additional help & resources

success.401kinabox.com

Email

sales@401kinabox.com

Call

(844) 602-4015