



# 401(k) Integrations **Solution Guide**

## Transforming the Landscape of Benefits Delivery

### Key Challenges of Managing Financial Connectivity Using Manual Processes

- The **burden** of having to remember to run reports, process payments and update third-party websites with up-to-date information *every time the payroll is run*.
- The increased chance of **human error and non-compliance** due to the use of the manual processes and outdated technologies.
- The **risk of losing pension funding** if an employee was missed or if there are process delays.

### What's Unique about our 401(k) Integrations Solution?

Our solution quickly and securely delivers 401(k) and other retirement plan information to respective retirement plan vendors.



The data is delivered securely, automatically and on-time, *every time*



Reduces risk, helps avoid fines, and ensures your plan maintains its tax-qualified status



Extensive network integration with over 60 retirement plan providers.



US-based support team

### TOP FEATURES

- **Flexible Delivery.** Send timely, accurate, and relevant data, that's automatically reformatted and delivered every pay period - no matter your pay frequency.
- **Extensive Network.** Over 200 integrated payroll and HRMS providers and a majority of financial providers and TPAs on the market.
- **Auditing Capabilities.** Keep track of every remittance, matching contribution, and correspondence with automated and user- friendly reports.
- **180/360 Data Flows.** Uni- and bi-directional data flows to retirement plan providers and back automatically.
- **Versatile:** Works with 401(k), 403(b), 529, and other retirement vendors, as well as over 60+ retirement plan vendors nationwide.



Tequila Brooks  
Director of HR  
at Covenant House  
New Jersey

*"Everyone in HR should see the Financial Integrations demo - just to see what*

*their company. Financial Connectivity boosted our productivity by 20%"*



## IT'S WHAT'S INSIDE THAT COUNTS

Automatically and securely deliver the necessary payroll data, including contributions, deductions, employee demographics, and salary-related information directly to your retirement plan provider - no matter the complexity of your organization and requirements.

- 1 View all the financial imports by day and time
- 2 Review and approve all of the imported deductions from your financial carrier(s) to update your payroll

The screenshot shows the 'My Dashboard' interface. The top navigation bar includes 'Main', 'Enrollment Self Service', 'Carrier Connectivity', 'COBRA', '401(k) CC', 'Benefits Reconciliation', 'Billing Consolidation', 'New Hire Reporting', 'Common Reports', and 'Dependent Audit'. The '401(k) CC' tab is active. Below the navigation bar, there are two main sections: 'All Deductions (3)' and 'All Financial Imports (2)'. The 'All Deductions' section has a table with columns: Organization, Name, Status, Type, Effective Date, Start, Deduction Amount, and Deduction Percent. It shows three rows for 'New Jersey Support Center' with types LOAN, 401K, and ROTH. The 'All Financial Imports' section has a table with columns: Name, Is Production Mode, and Import At. It shows two rows for 'Fidelity Deferral' and 'Fidelity Loan'. Red circles with numbers 1 and 2 highlight the 'All Deductions' and 'All Financial Imports' sections respectively.

Schedule a DEMO to see it in real size!  
support@rabcopayroll.com

### WHAT TO EXPECT

EverythingBenefits proudly supports over 6,000 organizations in simplifying their employee benefits through AI and automation. Here's what you'll love:



**No-sweat integration.** Expect to be up and running quickly! Our solution works on top of almost any tech.



**Proactive Tech.** Our technology is proactive and non-disruptive. Expect to save time and never miss a thing.



**Short Learning Curve.** Our intuitive platform will make you an expert in no time.



WE'D LOVE TO AUTOMATE YOUR BENEFITS!

### ABOUT US

EverythingBenefits is a tech company uniquely positioned to make it easier for employees to consume benefits, while providing employers faster and bigger return on the investment they've already made in their existing systems, processes, and relationships. Get ahead of the pack!

Overall	★★★★★	4.5/5
Ease of Use	★★★★★	5/5
Customer Service	★★★★★	5/5

\*Reviews on Capterra

