

Vestwell is the easy-to-use 401(k) platform with service **you can count on.**

From initial onboarding milestones to ongoing plan obligations, we are committed to the highest level of service for your retirement plan.



COMPREHENSIVE ONBOARDING SUPPORT

Your dedicated onboarding team will work with you to select critical plan features (who is eligible, whether you'll provide matching contributions, and how company contributions vest). We'll set up our market-leading payroll integrations and ensure frictionless payroll contributions, starting day one. To keep you in the know about our progress, we'll provide bi-weekly implementation status updates.



FLEXIBLE SERVICE OPTIONS

Each plan has an assigned and attentive service team with subject matter experts for both employers and employees. You have access to your support team over phone or email during our business hours 9am - 6pm ET. Extended hours may be available depending on the agreement. Plus, our comprehensive digital help center features 300+ articles and videos for self-service needs.



HANDS-ON CLIENT SUCCESS TEAM

Your dedicated implementation manager, plan design manager, and payroll integration specialist will support you in each step of the onboarding process, whether you are a company of 1 or 1,000. Following onboarding, your employer services team will help you ensure your plan is a success for your business. Your employer services team will also help your plan remain qualified and compliant with government-mandated testing and reporting.