PLAN DOCUMENT SERVICES | FACT SHEET

SimpliDocs for Morgan Stanley

Keeping a retirement plan free from administrative errors is vitally important, and not all plan documents and compliance services are created equally. As a trusted partner and Category of One provider, FuturePlan's unique, hands-on approach removes all complexity for your clients and makes the process easy from start to finish.

Our Approach to Servicing Every Plan

Consult

Document design matters. Whether a plan is a startup or takeover, we have the ability to provide comprehensive guidance to optimize each plan with a flexible design that grows with your client's business as more employees are onboarded.

Protect

FuturePlan's services reduce risk and offer your clients maximum protection and peace of mind that the plan is in compliance with all applicable laws and regulations.

Communicate

You and your clients are kept informed with tracking and transparency throughout every step of the process.

Experience the FuturePlan Difference

Unparalleled Scale:

As the largest TPA in the nation **managing over 30,000 plan documents,** we are nuanced and proactive, standing above other options on the market. We serve all plan types from solo(k) to thousand-employee retirement plans.

Dedicated Expertise:

We maintain a deep bench of professionals whose sole responsibility is to is to ensure your plan document is aligned with your intent and remains in compliance for the life of the plan.

Streamlined Onboarding:

Our leading technology and automation allows plan sponsors to answer a short set of questions about their business **in 15 minutes or less, with plan setup completed by FuturePlan in 5-10 days.**

Ready to Learn More?

For more information, visit FuturePlan.com/morganstanley or email SimpliDocs.MS@futureplan.com.

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