

ZERO

transaction fees.¹

Legacy 401(k) providers may hide dozens of transaction fees in complicated plan documents. **We don't.**

Our clear, affordable pricing

With **Asure Retirement Services**, you get affordable plans, diverse funds, and absolutely no transaction fees.

With Asure, you will **never** pay any of these fees:

Individual fees

Charged to the participants

401(K) SERVICE	BENCHMARK ²	OUR FEE
DISTRIBUTION FEES, INCLUDING RMDs		
Check	\$15–75*	\$0
ACH	\$18	\$0
Wire	\$18–25	\$0
Final distribution	\$25–75*	\$0
ROLLOVER FEES		
Check	\$0–15*	\$0
ACH	\$18*	\$0
Wire	\$18*	\$0
OTHER FEES		
Excess contribution 402(g) distribution fee	\$150	\$0
QDRO fee	\$450–500	\$0
Stale check fee	\$75	\$0
Check reissue fee	\$75	\$0
Stop / reissue fee	\$25	\$0
Overnight mail fee	\$25	\$0
Check copy fee	\$10*	\$0
LOANS		
Loan setup		
General purpose loan	\$75–175	\$0
Primary residence loan	\$325	\$0
Loan maintenance (annual)	\$25	\$0

Plan fees

Charged to the employer

401(K) SERVICE	BENCHMARK ²	OUR FEE
Plan termination fee	\$1,500–1,750	\$0
Deconversion fee	\$1,500	\$0
Plan amendment fee	\$150–300	\$0
New comparability profit sharing fee	\$750	\$0
Form 8955-SSA fee	\$750	\$0
5500 Preparation fee	\$750	\$0
Restatement fee	\$1,500*	\$0
Participant Search fee	\$65	\$0

Employee pricing

MONTHLY CHARGES

0.05% HII recordkeeping and custody fee³

0.01% HIA Advisory fee³

0.003–0.006% average fund fee⁴

Employer pricing

PLANS STARTING AS LOW AS

\$180 / month + \$7 / eligible employee

COMPLETE PLAN

Want to find out more? Contact

asureretirementservices@asuresoftware.com

¹ For non-rollover distributions, shipping and handling fees may apply to requests for check issuance and delivery.

² Benchmarking data is as of January 2023, with the exception of the data marked with an asterisk. Those data points are as of April 2022.

³ Asset fees are deducted monthly from the employee's account according to the HII Terms of Service and HIA Terms of Service. All prices are exclusive of applicable taxes. If the plan sponsor elects to hire an external investment advisor, the plan sponsor will pay such advisor as agreed between the plan sponsor and advisor. A one-time setup fee of \$499 may apply. An investment advisory fee paid to Human Interest Advisors (HIA) of 0.01% of plan assets and a separate fee for recordkeeping services and custody-related expenses paid to Human Interest Inc. (HII) of 0.05% of plan assets are deducted monthly from the employee's account according to the HII and HIA Terms of Service.

⁴ As of 9/30/2025, figure represents the weighted average of monthly fund net expenses ("expense ratio") for participants in new 401(k) plans launched after 8/4/25 and invested in Human Interest Advisors' Model Portfolios ("Models"). Provided for illustrative purposes only. Actual, average fund expenses a participant experiences vary based on the specific Model selected, allocation changes to Models, whether participants opt out of Models and choose their own investments and allocations, or allocation drift, especially in volatile markets. Model allocations and underlying fund expenses are subject to change. Before investing, carefully review the fund's prospectus, factsheet, and/or participant fee disclosure.

Asure Retirement Services are provided in partnership with Human Interest Inc., an affordable, full-service 401(k) and 403(b) provider that seeks to make it easy for small and medium-sized businesses to assist their employees with investing for retirement. Investment Advisory services are provided through Human Interest Advisors LLC, a Registered Investment Adviser and subsidiary of Human Interest Inc. For more information on investment advisory services, visit humaninterest.com/hia.

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