



## Bring your clients a better 401(k)

Betterment offers a 401(k) solution with automated administration, customizable investment options, and dedicated support to help you serve clients in a scalable way.

## Better for you

Easily scale your practice across retirement and wealth clients in an all-in-one platform.



Advisor dashboard with plan- and participant-level data and custom reporting.



Investment flexibility lets you select funds for the plan—and gives you the ability to serve as the 3(38) fiduciary.



Betterment acts as a limited 3(16) fiduciary, reducing administration duties (and freeing you up to focus on clients).



High-touch operations and client-support teams so you can service clients in a scalable way.

## Better for your clients

We wanted a better 401(k), so we built our own. Your client's Betterment 401(k) experience makes administering a retirement plan simple and seamless.



Turnkey, digital-first 401(k) with streamlined administration and operation support.



Integrations with some of the most commonly used payroll providers, including Rippling, TriNet, Gusto, and more.



A robust suite of financial wellness benefits—including 529 plans and 401(k) matching on student loan payments—so your clients can provide a powerful benefits package.



Comprehensive employee engagement program—including webinars, emails, and more—to help reduce the burden on plan sponsors.

## Better for employees

Our intuitive investment platform starts off with a better 401(k), but it also gives employees an easy way to manage their financial goals in one place.



Highly rated mobile app that's easy to use and lets employees track progress on the go.<sup>1</sup>



Personalized retirement plans with recommendations on how much to save and which accounts to use.



Ability to link external accounts and save for additional goals.



Set up employees for more than just retirement, with IRAs, [high-yield cash accounts](#)—and more.

Ready to offer a better 401(k) to your clients? Let's talk.

<sup>1</sup> App store rating is as of 06.04.2024 and is based upon all ratings and reviews received by Apple App Store® since the Betterment app was launched September 10, 2010. Current rating can be found on Betterment's App Store and is subject to change. App Store rating is calculated and generated by Apple based on the average of all total app reviews. Count of total ratings and reviews reflects the combined total of App Store rating and Google Play store ratings. No compensation was exchanged for reviews or ratings. Rating may not be representative of the Betterment client experience, advisory services, or investment performance. For more information, see more reviews at the App Store and Google Play Store.

529 accounts and their plans are held and managed by program administrators and managers outside of Betterment. 529s are only available as part of a bundled offering with a Betterment 401(k). Not available in the Essential plan.

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