



## Partner with Ubiquity

Increased revenue and robust competitive advantage for advisors and brokers, built in

For over two decades, Ubiquity has pioneered retirement savings plans designed exclusively for small and microbusinesses.

Of the more than five million small businesses in the United States, just 14% currently sponsor a 401(k) plan. Ubiquity makes it easy for financial advisors to capitalize on the micro-market and bring simple, affordable retirement savings to startup and small business clients.

Ubiquity can seamlessly integrate our industry-leading 401(k) plan solutions into your existing platform and portfolio—with minimal effort, and zero cost to you. Boost your revenue by extending your footprint into the vast and growing startup and small business segment.

### Meet Your Clients' Growing Need for Retirement Savings

By offering a 401(k) plan to your clients, you extend greater benefits from a single source—you. With an advisor-led plan from Ubiquity, you'll deliver greater value to your clients with a plan they can establish in minutes

- ▶ **Investments:** You decide. Craft a lineup from our universe of over 30,000 mutual funds and ETFs, or we can bring in a third-party expert to help reduce liability and cut down your workload. No matter your choice, we'll facilitate the needs of your customers through groundbreaking technology.
- ▶ **Support:** Ubiquity has a dedicated support team for you and your clients, ensuring exceptional customer experiences that maintain your reputation, while increasing client retention.

We handle the record keeping, compliance, servicing, and guide your clients through the admin process—while you reap the rewards. You can choose how involved you want to be, knowing your customers will be supported every step of the way.

### Savings for Your Clients—Zero Cost to You

With Ubiquity as your retirement savings partner, you can provide your customers with 401(k) plans designed from the ground up specifically for the under served and budget-conscious small business. And you'll receive all the service, with no burden to your bottom line.

- ▶ Flat-fee plans
- ▶ No minimum required
- ▶ No hidden fees

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### Grow Your Small Plan Portfolio

**We do the work, you reap the rewards.**

Choosing a partner in Ubiquity gives you exceptional technology and people, including experts in sales, marketing, and support, because technology sometimes needs a helping human hand.

- ▶ Expand your 401(k) pipeline with innovate prospecting technology
- ▶ Quickly and easily close a product gap
- ▶ Save critical hours on set-up, enrollment, and management

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### Get Started

You can get in touch with our dedicated Partnerships team by phone or by sending an email.

Phone: 415.766.3754

Email: [sales@myubiquity.com](mailto:sales@myubiquity.com)

[Schedule your free 401\(k\) consultation](#)