

401(k)ollaborate

An Exclusive Year-End Offer for Your Clients Only through You and Paychex



Working with Paychex can broaden the services available to your clients and further develop a successful financial advisor practice. We offer special programs that provide unique client-value opportunities.

Benefits to Extend to Your Clients, Regardless of Payroll Provider

Offer your clients an exclusive discount on Paychex Retirement Services. **These benefits are available only when referred by you!**

Exclusively for Financial Advisors, clients you refer to Paychex between Aug 28 and Dec 31, 2020 will receive:

3 Months Free

(Months 1-3) administration and participant fees, once they begin billing (\$500 maximum)

Ease. Choice. Service.

For over 20 years, advisors have partnered with Paychex to help grow their business and guide their clients toward retirement readiness. We are committed to offering you and your clients the options you need to be prepared for what lies ahead.

Get Started

1. Send referral information including company name, address, contact name, and phone number to wholesale401k@paychex.com.
2. Your local Paychex 401(k) sales rep will contact you to discuss proposal and pricing options.
3. Your Paychex sales rep will ensure the plan is submitted between 8/28/20 and 12/31/20.

For more information, contact us:

855-588-4775

paychex.com/advisors



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