

CamaPlan offers three distinct 401(k) accounts.

*Please note: fees are applied annually with any account you choose.

**CamaPlan provides the required plan documents, forms and updates.

Choose your plan:

☐ **CamaPlan Do Your Own
(DYO) Self-Directed Individual 401(k) Plan**

Owners perform all investment record keeping tasks, maintain bank accounts, and file tax returns. This plan is for **owners only**.

☐ **CamaPlan Record Keeping Self-Directed
Individual 401(k) Plan**

CamaPlan provides record keeping services for participants' self-directed investments. The record keeping statements will be provided to the administrator/tax preparer as required. All transactions will go through CamaPlan. This plan is for **owners only**.

☐ **CamaPlan Outsourced
Self-Directed Qualified Plan**

For business owners who have approved plan documents or are establishing another tax-deferred plan, such as a Traditional 401(k), Roth 401(k), Profit Sharing Plan, Employer Stock Ownership Plan, or others, CAMA provides record keeping services for self-directed investments. All transfers, distributions and contributions will be done within the original plan and authorized by the participant, plan administrator or possibly the trustees.

