

CamaPlan offers three distinct 401(k) accounts, the Do Your Own (DYO), Record Keeping and the Outsourced Account.

Choose your plan:

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

CamaPlan provides the required plan documents, forms and updates. Owners perform all investment record keeping tasks, maintain bank accounts, and file tax returns. This plan is for owners only. There is an annual fee with this account.

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

CamaPlan Account Specialists provide the required plan documents, forms and updates, and provide 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. There is an annual fee with this account.

CamaPlan Outsourced Self-Directed Qualified Plan

For business owners who have vapproved plan documents or arev 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.

