

## CASE STUDY

# Green Retirement, Inc. Reduces Administrative Burden and Enhances Retirement Plan Efficiency with 401GO

## CLIENT OVERVIEW

### Timothy Yee Green Retirement, Inc.

Timothy Yee, Chief Retirement Specialist and Co-Founder of Green Retirement, Inc., employs a personalized and mission-driven approach to client servicing.

With extensive experience in the financial services industry and deep expertise in retirement planning, Green Retirement, Inc. serves businesses, nonprofits, and individuals with an emphasis on socially responsible and values-aligned investing.





## Case Study: Green Retirement, Inc.

### THE CHALLENGE

## Sourcing a 401(k) Platform that **Efficiently** Serves Small Businesses

As an experienced retirement plan advisor, Mr. Yee sought a solution that would reduce administrative complexity while maintaining high service standards for both plan sponsors and participants.

Traditional retirement plan platforms frequently presented operational

inefficiencies, including extended onboarding timelines, manual processes, ineffective participant tools, and inadequate advisor support. These challenges limited Mr. Yee's ability to serve clients efficiently and detracted from the overall retirement plan experience.

### THE SOLUTION

## 401GO, An **Ideal Platform** for Streamlined Retirement Plan Administration

Mr. Yee selected 401GO after encountering repeated inefficiencies with legacy recordkeepers. The platform's speed and simplicity of plan setup immediately distinguished it from competitors. The fully digital onboarding process typically requires no more than 15 minutes, a significant improvement over the 4–6 week implementation windows he had previously experienced.

The platform's streamlined defaults and ready-to-execute documentation enabled quick client implementation with minimal friction. This capability proved particularly valuable when clients needed to establish plans rapidly for tax or compliance purposes.



*"If I spend 15 minutes on setup, I'm probably really slow. These are extremely fast."*

## Case Study: Green Retirement, Inc.

### KEY PLATFORM BENEFITS

#### Modernized Recordkeeping Capabilities and Dedicated Customer Support

One of 401GO's most notable advantages, according to Mr. Yee, is its intuitive design, particularly for investment management. He emphasized the platform's simplicity and usability, noting that both advisors and plan participants can navigate fund adjustments with ease.

***"The fund change tool is brilliant. On other platforms, I'd need to fill out forms, dot every 'i'—with 401GO, it's click, confirm, done. It couldn't be easier."***

This frictionless user experience reduces the need for hands-on support and enables participants to manage their investments independently, without consuming advisor time for routine changes.

#### Seamless Payroll Integration



Mr. Yee emphasized the importance of reliable payroll integration in delivering a high-quality plan experience. Unlike other providers that advertise integrations but deliver inconsistent performance, 401GO has consistently provided seamless, error-free connections with payroll platforms.

***"I've yet to have a payroll issue with 401GO. That alone sets them apart."***

This reliability translates to smoother operations, fewer client escalations, and a more scalable advisory practice.





## Case Study: Green Retirement, Inc.

### KEY PLATFORM BENEFITS

#### Exceptional Customer Support

401GO also distinguished itself through superior customer service. From Mr. Yee's first interaction with the platform, including a direct call with one of the co-founders, 401GO demonstrated a commitment to responsive, knowledgeable support.

***"I email a question, and I know I'll have a detailed response within 24 hours. That level of support is rare in this industry."***

He also noted the firm's dedication to building strong partnerships with advisors, citing advisor engagement events hosted by 401GO, including those conducted during the COVID-19 pandemic. These thoughtful initiatives fostered trust and reinforced 401GO's commitment to advisor success.

#### Measurable Results



**Onboarding Time Reduced:** From 6+ weeks to approximately 15 minutes per plan

**Operational Efficiency:** Decreased advisor time required for participant support and transactions

**Enhanced Participant Experience:** Clients reported overall ease of use with minimal issues

**Advisor Satisfaction:** Trusted support team and intuitive tools freed time to focus on client strategy rather than administrative tasks



## Case Study: Green Retirement, Inc.

### IDEAL USE CASES

#### 401GO for **Small** and Mid-Sized Businesses

Mr. Yee recommends 401GO for small and mid-sized business retirement plans, particularly those that do not require complex testing or advanced plan design structures. The platform's comprehensive simplicity and cost-effective pricing structure make it an ideal fit for firms seeking to scale plan offerings without increasing overhead.

"401GO works exceptionally well for straightforward plans. Sponsors appreciate the simplicity, and advisors appreciate the time saved."

Additionally, 401GO's competitive pricing model provides strong value, especially for smaller clients. While pricing has evolved over time, the value proposition remains compelling.

### CONCLUSION

#### 401GO as a Trusted Partner for **Green Retirement, Inc.**

401GO has enabled Green Retirement, Inc. to offer clients a streamlined, modern retirement solution while maintaining high service standards. From rapid onboarding and intuitive investment tools to personalized support and strong operational reliability, 401GO has delivered on its promise of efficiency and advisor enablement.

By addressing common industry pain points, including slow implementation, platform complexity, and service inconsistency, 401GO has established itself as a trusted partner to Green Retirement, Inc. and a valuable resource for advisors seeking to modernize their retirement offerings.

Book a demo: [401GO.COM](https://401go.com) / [Contact](#)

*"401(k)s should be the uncomplicated benefit. With 401GO, they finally are."*