

# DailyAccess PLUS



*DailyAccess PLUS combines award-winning\* retirement plan recordkeeping and administration from DailyAccess with InterServ's investment analysis and reporting.*

DailyAccess Corporation and its Registered Investment Advisory subsidiary, InterServ, LLC, work with fee- or commission-based financial advisors to deliver quality services to plan sponsors and their participants.

## How Financial Advisors and Plan Sponsors Can Benefit from PLUS

DailyAccess PLUS is a fully disclosed turnkey solution for both recordkeeping and investment fiduciary support. This comprehensive package can help financial advisors provide plan sponsors with time-saving tools and certified processes.

### DailyAccess Provides:

- Award-winning recordkeeping, administration and consulting services
- Complete open architecture
- An Account Executive assigned to each plan to help provide plan sponsors with superior service
- Easy-to-use online resources for plan sponsors and participants

### InterServ Provides:

- Investment processes to help plan sponsors manage plan investments for the benefit of their participants
- Proprietary investment analysis and reporting
- Quarterly plan reports and annual fiduciary investment review

Additionally, InterServ may serve in a co-fiduciary capacity to retirement plans to help implement a prudent investment selection process.

\*In 2008 DailyAccess received 22 awards for excellence in PlanSponsor Magazine's Defined Contribution Survey.

To learn more about DailyAccess PLUS  
toll free: **888.535.4322** | e-mail: **sales@dailyaccess.com**



DailyAccess is an ASPPA-certified recordkeeper



InterServ is a CEFEX-certified RIA

## CONTACT

Contact DailyAccess to request a customized retirement plan proposal.

Toll Free: 888.535.4322

E-Mail: [sales@dailyaccess.com](mailto:sales@dailyaccess.com)

[www.dailyaccess.com](http://www.dailyaccess.com)

## REVIEW

Review the proposal.  
DailyAccess and InterServ are available to assist with presentations to financial advisors and plan sponsors.

## SIGN

The plan sponsor signs the service agreement package. We do the rest.