



INDEPENDENT ADVISOR ALLIANCE W-2 PROGRAM



PROGRAM REQUIREMENTS

- Participant must be a full-time employee, working 30 or more hours per week.
- Advisor(s) must be receiving payment for advisory business through IAA.
- Advisor(s) must absorb all of the costs, including all fees, payroll expenses, and 401k match.

PROGRAM DETAILS

- The first 2 paychecks are physical checks mailed to the IAA office. ADP will establish portal credentials and verify banking information.
- Hours are due to Jessica on the last business day prior to the 15th and 30th/31st of the month. Payroll for non-producing advisors will occur on the 20th and 5th of each month. Producing advisors will get paid on the advisory comp schedule.

PROGRAM DETAILS

- 401k portal is established after one full payroll cycle.
- Benefits go into effect 30 days from 'hire' date.

COST OF PARTICIPATION

- One time on-boarding fee; \$1,000
- Monthly processing fee; \$150
- Termination fee; \$100
- 401K; \$28.50/month per participant plus \$.50 on the \$1 up to 6%

PROGRAM CONTACT

- Jessica Sexton: jsexton@iaaria.com