

Start your transition journey from Accrue 401k to Vestwell.



Our platform allows you to monitor and manage your retirement plan with ease. You’ll get access to modern tools, robust support, and holistic solutions.

And Vestwell is here to help you - every step of the way.

[Set up your plan on Vestwell](#)



What’s Ahead

Step 1: Set up your account

Using the link below, set up your Vestwell account using your email address and a secure password.

Step 2: Company Info

Your company information has been pre-loaded for review. Once you log in, you will need to confirm the following:

- EIN (hint: check tax documents if you are unsure where to find this number)
- Company Legal name
- Physical Address (cannot be a P.O. box)
- Phone Number
- Entity Type
- State of Incorporation

Step 3: Agreements

Review and agree to Vestwell’s Terms of Service and related investment management agreements.

Step 4: Payroll and Payment

Confirm your pay groups, pay schedules, payroll contact, and company bank account. Some plans may also need to reconnect their payroll integration to keep contributions running smoothly.

Need help?

We’re here to support you throughout registration and beyond. You can explore [Vestwell’s Help Center](#) for step-by-step guidance on registration and answers to common platform questions. We’ll also be hosting an upcoming Registration Webinar, where we’ll walk through what to expect during registration, highlight available resources, and share key information to help ensure a smooth and successful transition.

For a centralized view of timelines, updates, and transition details, visit the [Transition Hub](#).



Register now to make this process as smooth as possible.

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