









How to Start a New 401(k) Plan

	 Plan Design	 Plan Processing	 Plan Transfer (if applicable)	 Completion
Step 1	<p>Consultation with Plan Advisor Identify the plan specifics such as eligibility requirements and employer contributions</p>	<p>Slavic401k New Plans team will:</p> <ul style="list-style-type: none"> Review executed documents Confirm details Set up the plan prior to the effective date 	<p>A Transfer Coordinator and our Mergers team will:</p> <ul style="list-style-type: none"> Conduct review of prior plan document Establish transfer timeline with prior vendor Do not terminate your prior plan until instructed 	<p>Your plan setup and activation is complete.</p> <p>Our Client Success representatives will work with the plan sponsor to service the plan moving forward. Client Success can be reached at ClientSuccess@slavic401k.com.</p>
Step 2	<p>Complete and execute the following documents at least 15 days prior to desired effective date:</p> <ul style="list-style-type: none"> Plan Setup Form Adoption Agreement Employee Census Board Resolution 	<p>Processing a new plan takes approximately 15 business days</p> <ul style="list-style-type: none"> Additional time may be needed during the peak season of October to March 	<p>Expect a minimum of 90 days from your new plan's effective date to complete the transfer of your old plan into the new one.</p>	<p>Our Client Success Account Specialists will be the point of contact for adopting employers. They can be reached at AdoptingEmployers@slavic401k.com.</p> <p>Our Customer Service Center will be the point of contact for plan participants.</p>
Step 3	<p>Transferring an existing 401(k) plan into your new 401(k) plan?</p> <p>Click here to review the documents required to transfer the plan.</p> <p>To avoid delays, email all documents ASAP to: MergersDepartment@Slavic401k.com</p>	<p>Online enrollment is enabled for plan participants</p> <ul style="list-style-type: none"> Enrollment materials are sent Webinars are available to educate employees on the benefits/features of your 401(k) plan 	<p>While your prior plan is in the transfer process:</p> <ul style="list-style-type: none"> Employees can contribute to the new plan Employees with active loans should continue payments to prior plan administrator until the transfer is complete 	<p>Customer Service Center Monday - Friday, 8 a.m. to 8 p.m. ET Phone: (800) 356-3009</p> <p>To reach Client Success, call (800) 356-3009 and follow prompts for "plan sponsor/PEO" or "adopting employer"</p>
	 Your Plan Advisor	 Your Plan Advisor	 Your Plan Transfer Coordinator	 Customer Service or Client Success