



# Access Plan Forms and Documents for Enrolling Employees

Visit <https://www.yourplanaccess.net/retirementplanconsultants/>

Type in your **Username** and **Password**, as provided in your welcome letter.

Select role from dropdown menu: **Sponsor**

Click the **Login** button

A One-time PIN (OTP) is required to login. If you need additional guidance with the OTP process, click the Logging in with **Multi-Factor Authentication (MFA)** link (located above this gray login box).

When enrolling employees, plan forms and documents can be accessed online and downloaded for open enrollments, etc. To run your plan specific documents, click the **Forms, Documents and Reports** Tab and select **Forms and Documents** off the dropdown menu.

Choose **Generate Forms** off the dropdown list if not already shown and click the **Online Enrollment Flyer** in the Form Selection section shown and click the **Submit** button.



# Access Plan Forms and Documents for Enrolling Employees

Form Selection

**Beneficiary Designation Form**  
To be completed by participant & sent to RPC. \*\*Must use paper form when Spousal Consent required

**Enrollment Form**  
To be completed by participant & sent to RPC for account setup

**Online Enrollment Flyer**  
Generate an online enrollment flyer with your plan specific password, to provide new employees.

Options

Divisions: All Divisions

Select employee: All Employees

Select export file type: Adobe Acrobat (PDF)

**SUBMIT**

Next, choose **Beneficiary Designation Form** off the Form Selection list and click the **Submit** button.

The forms may take a little time to load and once loaded this pop-up box will be displayed. Follow the **Click HERE to Open Your Form** link to open the forms so they can be downloaded.

https://www.yourplanaccess.net/retirementplanconsultants...  
yourplanaccess.net/retirementplanconsultants/createforms.aspx

Your form is ready to be saved or viewed.

**Click HERE to Open Your Form**

**CLOSE**

Plan Sponsor and Participant Forms

Operational Plan Sponsor Forms may be obtained by clicking [HERE](#). Operational Participant Forms may be obtained by clicking [HERE](#).

Enrollment Forms and Online Enrollment Flyers may be generated below.

Forms and Documents

Generate Forms

Generate Forms

**View Documents**

None

Form Selection

**Beneficiary Designation Form**  
To be completed by participant & sent to RPC. \*\*Must use paper form when Spousal Consent required

**Enrollment Form**  
To be completed by participant & sent to RPC for account setup

**Online Enrollment Flyer**  
Generate an online enrollment flyer with your plan specific password, to provide new employees.

Options

Divisions: All Divisions

Select employee: All Employees

Select export file type: Adobe Acrobat (PDF)

**SUBMIT**

Choose **View Documents** off the dropdown list if not already shown.



## Access Plan Forms and Documents for Enrolling Employees

The remaining documents will be located and can be directly downloaded from this screen by clicking on the document links, such as:

- **08 Summary Plan Description**
- **09 Annual Notice**
- **13 404(a)(5) Fee Disclosure**
- **404(a)(5) Investments Comparative Chart**

Select Forms

View Documents

Filter column

Document/Form Name

Filter value

CLEAR RESULTS

Document/Form Name	Document/Form Group	Employer	Created	Last Viewed	From	To	<input type="checkbox"/> Delete
<a href="#">01 RPC Services Agreem...</a>	Plan Documents	1 Alliance Geomatics, LLC	10/09/2018	10/30/2019			
<a href="#">01b Third Party Service ...</a>	Plan Documents	1 Alliance Geomatics, LLC	10/09/2018	05/09/2019			
<a href="#">02 3(38) Fiduciary Agree...</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	05/09/2019			
<a href="#">03c TD Ameritrade Servi...</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	02/01/2016			
<a href="#">03d TD Ameritrade Exhib...</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	02/01/2016			
<a href="#">04 Formal Record of Ado...</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	11/17/2016			
<a href="#">05 Adoption Agreement</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	08/26/2019			
<a href="#">05a Plan Amendment</a>	Plan Documents	1 Alliance Geomatics, LLC	12/12/2019	12/12/2019			
<a href="#">05b QDRO Procedures</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	02/01/2016			
<a href="#">05e Hardship Regulation...</a>	Plan Documents	1 Alliance Geomatics, LLC	04/09/2020	04/09/2020			
<a href="#">06 Basic Plan Document</a>	Plan Documents	1 Alliance Geomatics, LLC	06/20/2017	10/30/2019			
<a href="#">07 IRS Opinion Letter</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	02/01/2016			
<a href="#">08 Summary Plan Descri...</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	11/27/2019			
<a href="#">09 Annual Notice</a>	Plan Documents	1 Alliance Geomatics, LLC	11/26/2019	11/27/2019			
<a href="#">12a Retirement Plan Co...</a>	Plan Documents	1 Alliance Geomatics, LLC	02/01/2016	11/26/2019			

You can direct participants here: <https://retirementplanconsultants.net/plan-participant-resource-center/> for an online enrollment guide with step by step instructions.