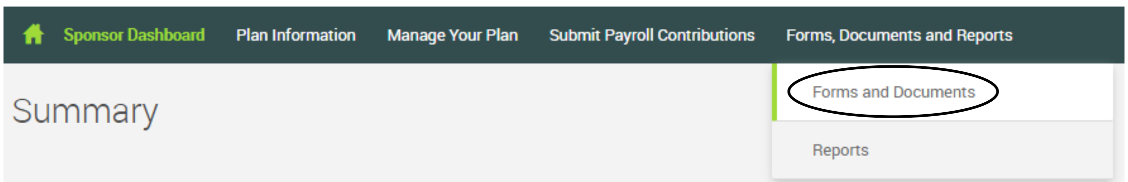
RETIREMENT
PLAN CONSULTANTS LLC

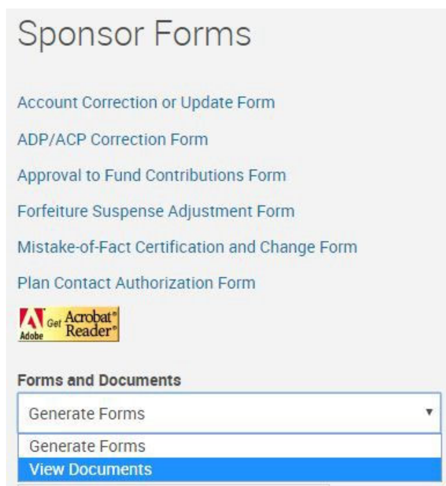
Annual Notice Distribution Guide

Where do I download the Annual Notice & 404(a)(5) Fee Disclosure & Comparative Chart

- Go to https://www.retirementplanconsultants.info/login, and select **Sponsor** from dropdown menu and login with your username and password.
- If you are unsure of your username or password, please contact RPC at 877-800-1114.
- Click the **Forms, Documents and Reports** Tab, then select **Forms and Documents** from dropdown menu.



- Click the **Forms and Documents** dropdown menu, select **View Documents** from dropdown list.



- This will prompt a new page with all documents listed. Scroll down and select **09 Annual Notice**.
- Scroll down and select **404(a)(5) Fee Disclosure Report and 404(a)(5) Investment Comparative Chart**.

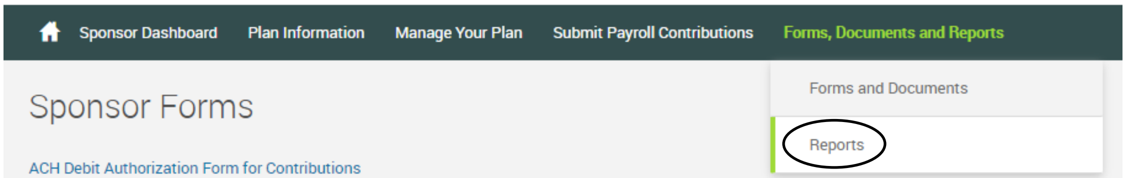
Who needs to receive these notices?

- The Annual Notice must be distributed to all eligible employees at least 30 days prior to the beginning of each plan year. *For example: December 1 for all plans with a 12/31 year-end.*
- The **404(a)(5) Fee Disclosure Report** and the **404(a)(5) Investment Comparative Chart** need to be distributed at least annually to all eligible participants, terminated participants and account holding beneficiaries.

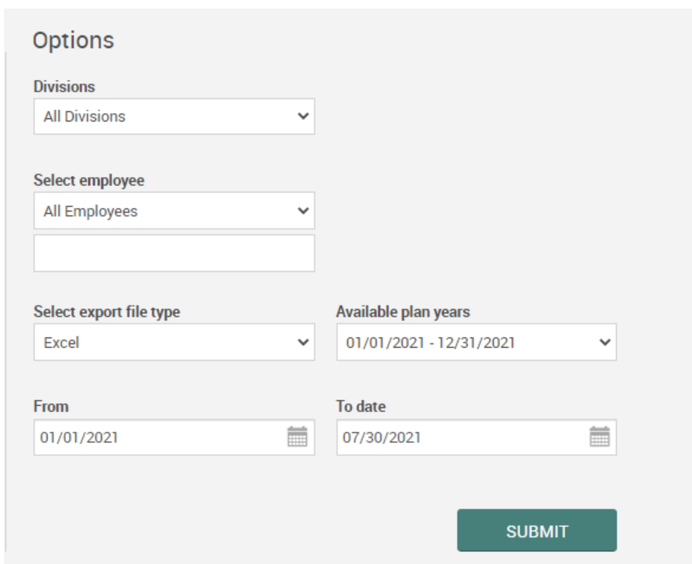
(continued on next page)

Where do I download a list of eligible participants & their contact information?

- On the Sponsor Website, click the **Forms, Documents and Reports** Tab, then select **Reports** from dropdown menu.



- Under **Report Selection**, click **Employee Contact Information**.
- On the **Options** screen, choose the following:
  - Divisions: choose All Divisions (or choose from dropdown list, if applicable)
  - Select employee: choose All Employees from dropdown list
  - Select export file type: choose Excel from dropdown list
  - Available plan years: choose current plan year from dropdown list
  - From: enter the first day of the plan year
  - To date: enter today's date



- Click the **SUBMIT** button.
- A separate window will open and will indicate when the report is ready. Click the **Open Report** link.