### RETIREMENT PLAN CONSULTANTS LLC



# **Annual Notice Distribution Guide**

Where do I download the Annual Notice and 404(a)(5) Fee Disclosure Report and Investment Comparative Chart?

- Go to <u>https://www.retirementplanconsultants.info/login</u>, and select **Sponsor** from the 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.
- You will be required to enter a one-time PIN.
- Click the Forms, Documents and Reports Tab, then select Forms and Documents from the dropdown menu.



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

Sponsor Forms						
Account Correction or Update Form						
ADP/ACP Correction Form						
Approval to Fund Contributions Form						
Forfeiture Suspense Adjustment Form						
Mistake-of-Fact Certification and Change Form						
Plan Contact Authorization Form						
Get Acrobat"						
Forms and Documents						
Generate Forms	۳					
Generate Forms						
View Documents						

- This will prompt a new page with all documents listed. Scroll down and select 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<sup>st</sup> 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.
- <u>Please Note</u>: The 404(a)(5) Fee Disclosure Report is only updated when there are changes to fees. If there are not any recent fee changes, the created date of the Disclosure will not be a current date.

## Annual Notice Distribution Guide continued

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

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

f	Sponsor Dashboard	Plan Information	Manage Your Plan	Submit Payroll Contributions	Forms, Documents and Reports
Sponsor Forms			Forms and Documents		
ACH Debit Authorization Form for Contributions					Reports

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

Options			
Divisions			
All Divisions	~		
Select employee			
All Employees	~		
Select export file type		Available plan years	
Excel	~	01/01/2021 - 12/31/2021	~
From		To date	
01/01/2021	<b></b>	07/30/2021	
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- Click the **SUBMIT** button.
- A separate window will open and will indicate when the report is ready. Click the **Open Report** link.

