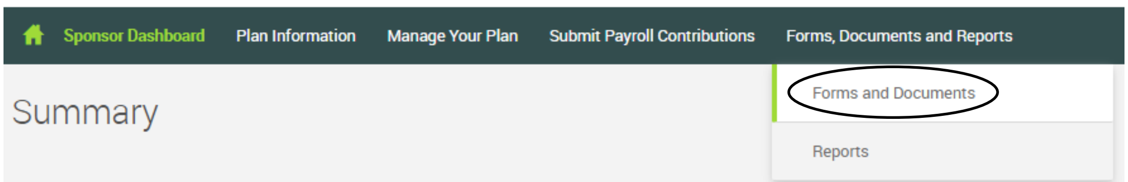
RETIREMENT
PLAN CONSULTANTS LLC

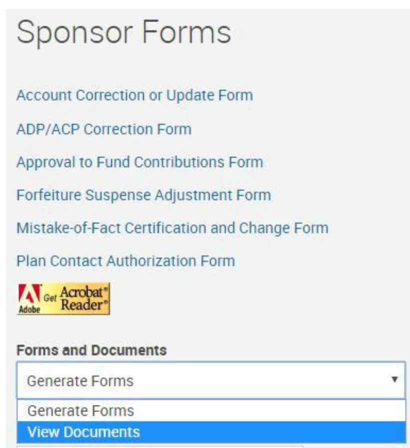
Annual Notice Distribution Guide

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

- Go to https://www.retirementplanconsultants.info/login, 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.



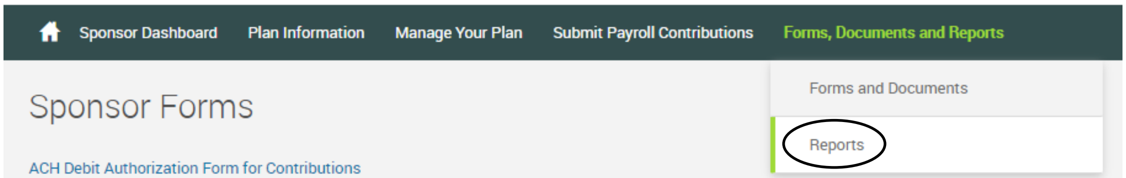
- This will prompt a new page with all documents listed. Scroll down and select **Annual Notice**.
- Scroll down and select **404(a)(5) Fee Disclosure Report** and **404(a)(5) Investment Comparative Chart**.

Who needs to receive these notices?

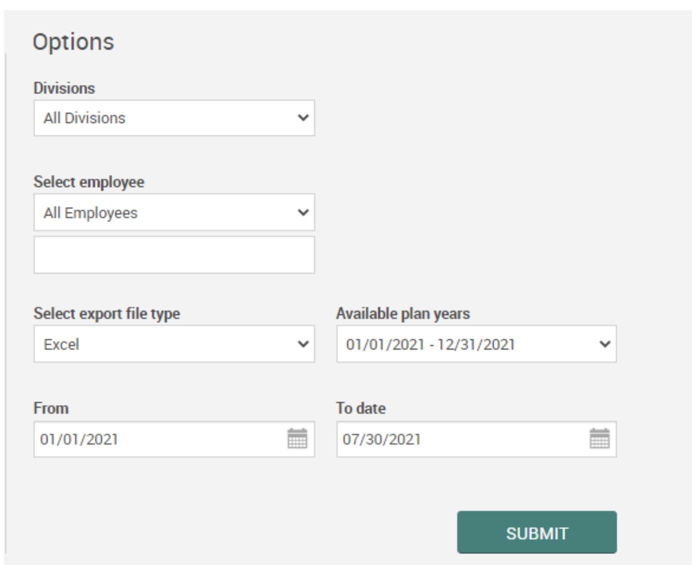
- The Annual Notice must be distributed to all eligible employees at least 30 days prior to the beginning of each plan year. *For example: December 1st for all plans with a 12/31 year-end.*
- The **404(a)(5) Fee Disclosure Report** and the **404(a)(5) Investment Comparative Chart** need to be distributed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

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.



- 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
  - Select export file type: choose **Excel** from the dropdown list
  - Available plan years: choose current plan year from the 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.