

Retirement Setup Form

Company ID:

Company Name:

What type of Retirement Plan?

If OTHER, please describe:

Are ALL employees eligible? Yes, ALL NO, see rules:

Is there a Waiting Period? No YES:

Are Plan Loans allowed? No YES, Maximum concurrent number of loans:

Type of Employer Match:

What earnings should be included in calculation for contributions and match? Use ACTUAL codes on company in question (e.g. 'all except E10, E12' or 'E01, E02, E03, E04')

Is the match a standard percentage of earnings? No YES, see below

Example: Employer matches 75% of the employee's contribution, up to 3% of earnings. If the employee makes \$100 and contributes 10% (or \$10) into the 401K, the employer match would be \$3.

% of employee's contribution, up to

% of earnings

Is the match a TIERED percentage of earnings? No YES, see below

Ex: Employer matches 100% of the employee's contribution, up to 3% of earnings, then 50% of the next 2% of earnings.

% of employee's contribution, up to

% of earnings

% of employee's contribution, applicable range:

% of earnings

% of employee's contribution, applicable range:

% of earnings

If multiple deduction types are matched (ex: 401K and Roth), indicate Match Details below:

Are Salary Limits required? No YES, see limits below (to be updated MANUALLY each year):

Do ALL employees have DOB in the system? Yes NO* **IF NO, DOB MUST BE ADDED**

Is a separate code needed for catch-up? (not usually used) No Yes, use code:

Pay-Net is currently set up to upload files to the providers listed below. If your provider appears in the list and you would like Pay-Net to automatically submit payroll information on your behalf, for a fee of \$5.00 per Processing, make the appropriate selection. If your provider does not appear below, indicate whether you would like to pursue setting up a new integration, or if you will be uploading data yourself.

Name of provider not listed above:

Submitted By:

Date: