

## PPA Restatement Checklist

Below is the information we will need to restate your plan document.

### Basic Client Information:

Company Name: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Fiscal Yearend: \_\_\_\_\_ Plan Yearend: \_\_\_\_\_

Type of Entity:  C-Corp  S-Corp  Partnership  Sole Proprietor

LLC (taxed as  Corp  Partnership)  Other: \_\_\_\_\_

Plan Name: \_\_\_\_\_

Are you interested in specific changes?  No  Yes Specify: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you have an active defined benefit plan?  No  Yes (we may need more information)

### Documentation:

\_\_\_\_\_ Most Recent Adoption Agreement

\_\_\_\_\_ Master Plan Document

\_\_\_\_\_ Trust Document

\_\_\_\_\_ All Amendments since adoption of plan document above

\_\_\_\_\_ IRS Determination or Opinion Letter

\_\_\_\_\_ Loan Policy, if applicable

\_\_\_\_\_ Most recent Yearend Administration Report