

Cycle 3 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)

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