



Partner with Tilson to ease the hassle of administering your plan and receive support to help meet due diligence obligations.

Current Responsibilities Single Employer 401(k) Plan	With Tilson's Multiple Employer 401(k) Plan
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Administrative Responsibilities

	Current Responsibilities Single Employer 401(k) Plan	With Tilson's Multiple Employer 401(k) Plan
Investment of Plan Contributions	?	Tilson HR
Tracking Contribution Limits	?	Tilson HR
Tracking Catch-Up Contributions	?	Tilson HR

Distribution Processing

	Current Responsibilities Single Employer 401(k) Plan	With Tilson's Multiple Employer 401(k) Plan
Approve or Deny Hardship Requests	?	Tilson HR
Approve or Deny Loan Requests	?	Tilson HR
Prepare Loan Amortization Schedules	?	Slavic401k
Coordinate Loan Deductions	?	Tilson HR
Process Distributions Upon Termination	?	Tilson HR

Due Diligence Responsibilities

	Current Responsibilities Single Employer 401(k) Plan	With Tilson's Multiple Employer 401(k) Plan
Slavic401k Investment Monitor	?	Slavic401k
Investment Policy Statement Sample	?	Slavic401k
Retirement Plan Review	?	Slavic401k
Investment Choice Additions/Deletions	?	Tilson HR

Plan Compliance

	Current Responsibilities Single Employer 401(k) Plan	With Tilson's Multiple Employer 401(k) Plan
Consultative Design Services	?	Tilson HR and Slavic401k
Advanced Allocation Designs	?	Tilson HR and Slavic401k
Proprietary Plan Document Support	?	Slavic401k
Preparation of Amendments	?	Slavic401k
Monitor Pending Legislative Actions	?	Slavic401k
Merger and Acquisition Support	?	Slavic401k

Nondiscrimination Testing

Annual Census Collection	?	Tilson HR
Mid-year Testing	?	Tilson HR and Slavic401k
Year-end Testing	?	Tilson HR and Slavic401k

Annual Reporting

Form 5500 Preparation	?	Slavic401k
Audit Support and Expense	?	Tilson HR
Forms 1096 and 945 Preparation	?	Slavic401k

Enrollment & Education

Track Eligibility	?	Slavic401k
Notify Participants of Eligibility	?	Slavic401k
Establish Deductions with Payroll	?	Tilson HR
Conduct Online Enrollment Education	?	Slavic401k
Conduct Ongoing Employee Education	?	Slavic401k

Participant Assistance

Provide Asset Allocation Tools	?	Slavic401k
Explanation of Distribution Options & Tax Implications	?	Slavic401k
Qualified Domestic Relations Order (QDRO) Support and Analysis	?	Tilson HR and Slavic401k

Leave the Challenges of Administering Your Retirement Plan to Us

We have partnered with Slavic401 to offer you a retirement plan with tremendous benefits, including:

- Saving you time and expense by maintaining your employee payroll data
- Helping you comply with the Department of Labor requirements by transmitting contributions and participant data
- Reducing turnaround time for participant transactions such as loans and distributions
- Handling nondiscrimination testing and required government filings including the Form 5500, keeping your plan in compliance
- Managing the annual independent audit, saving you both time and money
- Providing nationwide enrollment support and ongoing participant education to help boost participation
- Notifying employees of their eligibility, key plan amendments, and information that helps you maintain employee plan communication
- Offering complete participant account management online

Not a Retirement Plan Expert?

Just work with one. We've partnered with Slavic401k to deliver guidance and support you need to offer a quality retirement plan.

If you are interested in learning more about a high-impact employee benefit that enhances employee motivation and retention at minimal time and cost, please **contact us** for more information on your retirement plan. It's that simple!

Email sales@tilsonhr.com, call (317) 885-3838 or visit tilsonhr.com/get-started/.

All information is for illustrative purposes and subject to change. It is not intended as a substitution for legal advice, and you should not rely on this information. You should consult with your attorney.