Process Timeline for Retirement Plan Administration

BENEFIT PLANS PLUS LLC
A MEASURABLE DIFFERENCE™

Soon after plan year end
Benefit Plans Plus sends the data collection request to clients via email.

30 days after initial request
Client deadline to submit annual data questionnaire and employee census data in good order.

2.5 months after plan year end
Benefit Plans Plus completes compliance testing and any requested contribution calculations by this date *(provided the information was submitted timely to Benefit Plans Plus and in good order)*.

7 months after plan year end
Form 5500 filing deadline. **Benefit Plans Plus** prepares valuation and Form 5500 and delivers to clients before this date. *(or 9 1/2 months if extension is filed)*

2 months after filing Form 5500
Client will deliver participant statements and a summary annual report *(prepared by Benefit Plans Plus and included in the valuation report)* before this date to participants.

45 days before next plan year starts
Benefit Plans Plus prepares any required annual disclosures for the plan and provides them to the client.

30 days prior to beginning of next plan year
Client will deliver required annual disclosures to participants by this date.