

Establishing, amending, and restating plans made easy with *Ascensus' Pre-Approved Plan Document Sponsorship Service*



Initiate services today for an annual fee of \$175

Ascensus provides a total outsource document solution for qualified retirement plans by becoming the pre-approved plan document sponsor—relieving your administrative burdens associated with document sponsorship. Our service allows you to focus on your clients while our experts focus on the IRS-required pre-approved plan document sponsorship duties, ongoing document maintenance, and ever-changing document compliance.

Features

Documents

You get access to Ascensus' full suite of 401(k), Individual(k), Profit Sharing and Money Purchase adoption agreements that are reviewed upon completion to make sure they're in compliance.

Web-based

Ascensus does all of the document processing—your clients complete the online plan design questionnaire and their documents are delivered through a secure web portal and can be signed electronically.

Financial advisor notifications

You are copied on communications Ascensus delivers to your clients.

Customized summary plan description (SPD)

An SPD is generated based on the plan provisions selected by your clients in the online plan design questionnaire.

Future compliance

Ascensus provides all amendments required to keep plans in compliance and helps your clients restate their plan documents every six years as required by the IRS.


Voluntary Correction Program (VCP) service*

Ascensus can assist your clients in completing the IRS' VCP if they failed to timely restate their plan documents or failed to amend their documents for other IRS required changes.

Customer service center

You and your clients can get your document and amendment questions answered by Ascensus' experts using one of the below methods.

*Additional fees apply

 844-858-6078

 AscensusDocsRJ@Ascensus.com

 dcs.ascensus.com/ascensusdocsRJ