

Shift fiduciary, administrative and operational burdens from your organization to ours with The Big Green Retirement Plan

Employer Responsibilities Under a Traditional Single Employer Plan

- Establish Plan Provisions
- Appoint Plan Administrator
- Plan Document Administration
- Administer Plan Provisions
- Determine & Monitor Eligibility
- Plan Operational Oversight & Compliance
- Government Filings & Tax Reporting
- Compliance Testing
- Forfeitures & Suspense Accounts
- Plan Audit
- Approve Loans, Distributions, Terminations, QDROs
- Participant Notices, Statements & Disclosures
- Initial & Ongoing Employee Education
- 404(c) Compliance (when applicable)
- Appoint Investment Committee (optional)
- Develop Quantitative & Qualitative Investment Process
- Establish & Maintain Investment Policy Statement
- Select Investments
- Ongoing Monitoring of Investments
- Remove & Replace Investments
- Service Provider Selection & Oversight
- Annual Plan Review & Valuation

Employer Responsibilities Under **The Big Green Retirement Plan**

- Provide accurate payroll and other data
- Make timely contributions
- Monitor fiduciary service provider(s)



For more information about our 3(16) Fiduciary Assessment contact Rob Thomas at 860.830.7310 or rthomas@socialk.com

