

# Plan Administrative Service Support

*'help enhance a business' focus and efficiency'*

## Traditional Responsibilities

### Plan Sponsor Tasks for the Plan

- Payroll
- Hardships
- Notices
- Investment Choices
- Terminations
- Loans
- Qualified Domestic Relations Orders
- Employee Educational Materials
- Eligibility
- Employee Contributions
- Plan Design
- Summary Plan Documents
- Required Minimum Distributions
- Trustee Duties
- Rollovers
- Distributions
- Fiduciary
- Participant Support
- Enrollment
- Review Materials

### Typical Vendor Tasks for the plan

- Recordkeeping
- Quarterly Participant Statement
  - Compliance & Discrimination Testing
  - Participant & Sponsor Website
  - Ongoing Enrollment Support

## Responsibilities After the TAG MEP

### Employer

- Send Excel File to TAG

### TAG Multiple Employer Plan

- Investment Choices
- Plan Design
- Fiduciary
- Payroll
- Hardships
- Notices
- Qualified Domestic Relations Orders
- Recordkeeping
- Terminations
- Loans
- Filings
- Eligibility
- Employee Contributions
- Summary Plan Documents
- Required Minimum Distributions
- Rollovers
- Distributions
- Participant Support
- Enrollment
- Review Materials
- Employee Education Materials