



New plan implementation process

Our three-phase approach takes the challenge out of plan implementation and gets your client's 401(k) plan started right. We'll make sure you and your client have the tools and solutions to make plan administration easy and get their participants retirement ready. The Implementation Manager will oversee the entire implementation process. This individual will work with you and your client to manage the day-to-day details and timeline of the plan's implementation and keep you informed.

The implementation process typically takes several weeks, depending on the complexity of the plan.

PHASE 1: DOCUMENT

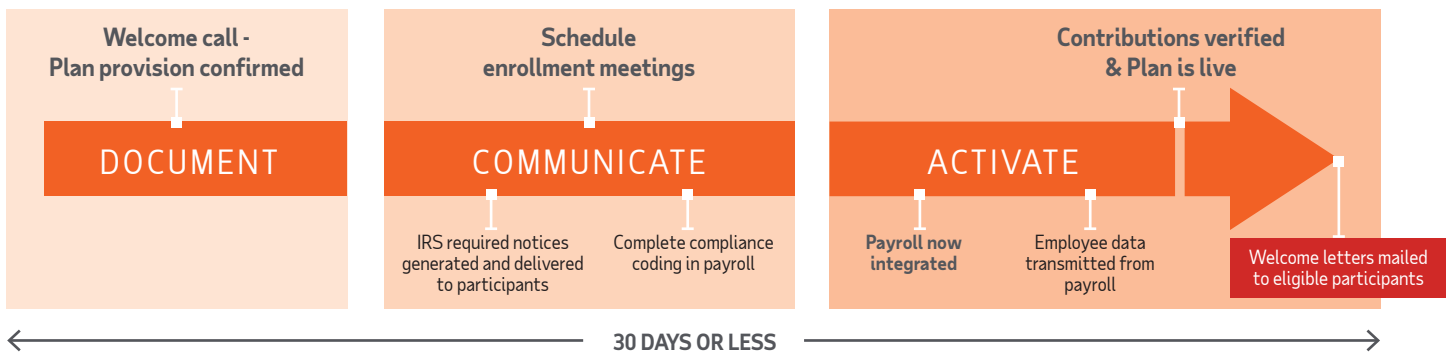
Meet your Implementation Manager who will review our implementation process, gather critical information and document the plan design.

PHASE 2: COMMUNICATE

An ADP Retirement Counselor (if applicable) will contact you to discuss your client's education needs. It is the responsibility of the Retirement Counselor to help employees understand the importance of saving for retirement, the plan highlights and features, and the ADP tools and resources available to them. The Retirement Counselor also helps to empower employees to use this benefit to its full potential. The enrollment into the plan is available online or via the ADP Mobile App with interactive and informative information that can be used during the plan implementation phase.

PHASE 3: ACTIVATE

The Implementation Manager will work proactively with you and your client to obtain all the information needed to activate the plan. The Implementation Manager will help with payroll integration and will assist with submitting your client's first contribution file to ADP. Once the plan start date has passed, you and your client will receive login credentials for the Advisor Access portal and the Plan Sponsor Website respectively.



The typical implementation process will take 30 days or less from the date all required documentation is received in good order but may vary based on complexity. We will customize an agreed upon timeline based upon the needs of the client and requirements of the plan.

ADP RETIREMENT SERVICES 71 Hanover Road Florham Park, NJ 07932

ADP, Inc. owns and operates the ADP.com, Advisor Access Portal and myKplan.com websites, as well as the ADP mobile app.

Retirement Counselors do not provide, nor should their assistance at employee meetings be construed as, investment or financial advice for any individual or situation.

Only registered representatives of ADP Broker Dealer, Inc. (ADP BD), Member FINRA, or, in the case of certain products, a broker-dealer firm that has executed a marketing agreement with ADP, Inc., may offer and sell ADP retirement products or speak to retirement plan features and/or investment options available in such ADP retirement products, and only associated persons of ADP Strategic Plan Services, LLC (SPS) may speak to any investment management or advisory services provided by SPS or any third party in connection with such ADP retirement products. SPS is an SEC Registered Investment Adviser. Registration does not imply a certain level of skill or services.

ADP, the ADP logo and Always Designing for People are trademarks of ADP, Inc. All other trademarks and service marks are the property of their respective owners. 99-6432-ADV-1022 ADPRS-20221019-3733 Copyright © 2021-2022 ADP, Inc. All Rights Reserved.

FOR FINANCIAL PROFESSIONAL USE ONLY - NOT FOR DISTRIBUTION TO THE PUBLIC.