



**401k Essentials** is designed to provide sponsors of qualified retirement plans, brokers, agents, fiduciaries, financial advisors and other private sector businesses with interactive tools, forms, documents, checklists, periodic deadline reminders one might need to effectively and efficiently fulfill their role in operating a 401(k) plan with tasks and issues they encounter on a day-to-day basis.

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Written in Plain English:

- **401k Essentials** is a unique resource that explains and simplifies complicated information related to operating a 401(k) plan.
- **401k Essentials** discusses, explains and offers tips surrounding complicated federal laws and confusing operational requirements related to 401(k) qualified retirement plans operating under ERISA so that they can be understood by the professional and lay person alike.
- **401k Essentials** includes a voluminous library of proprietary forms, checklists, model language, company policies, sample letters and employee communications covering a wide range of 401(k) topics. These forms can be downloaded and customized for your use as you deem necessary.

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