

## 2015 Plan Administration Checklist

- Census template (send to Erin via email)
  
- Completed and signed questionnaire
  
- Signature page from plan administration services agreement or engagement letter, whichever is applicable
  
- W-3 (for plans on the calendar year)
  
- Payroll summary
  
- Copy of fidelity bond summary/declarations page indicating coverage amount
  
- Copies of plan brokerage statements (if applicable)