Instructions for opening a new *EZ* K Plan™ 401(k)

Complete and submit the New *EZ* K Plan™ 401(k) Set-up Form.
Feel free to call us toll-free at 877-254-7085 if you have any questions while completing the set-up form.

STEP 1: Application

The completed New *EZ* K Plan™ 401(k) Set-up Form along with a check for the one-time application fee of $100 should be mailed to:

Revzon Consulting Group, LLC
Attn: EZK Services
465 Furnace Street, Suite 6
Marshfield, MA 02050

STEP 2: Plan Design

Once the Revzon Consulting Group has received the completed New *EZ* K Plan™ 401(k) Set-up Form you will be contacted to set up an introductory call to review the plan design. At this time you will be asked to complete the following forms:

- Fund Line-up
- Company Census
- Custodial Agreement
- ACH Sheet
- Portfolio Sheet (if applicable)
- RCG Services Agreement

Links to these documents can be found at **http://www.ezkplan.com**.

STEP 3: Plan Establishment

It will take approximately 2 weeks to set up the plan and produce the plan documents along with the ancillary forms. Completed plan documents will be sent to you along with detailed instructions. At this time, the fund line up and census forms need to be submitted in order to proceed to step 4.

STEP 4: Participant Enrollment - Participants may enroll in the plan by one of two methods

The first method is on-line enrollment and is free. After the sponsor has submitted the census, Personal Identification Numbers along with the participants account number will be sent via email to the sponsor for distribution to the participant. The participant will log onto the website site, access their account, and enter their deferral percent (whole percent) and their investment choices (whole percent). A deferral report will be sent to the employer for use in setting up their payroll file.

The second method, Manual Enrollment (input by record keeper), has a base fee of $50. plus a $5./participant fee (billed to the employer). When Manual Enrollment is selected there are two options available:

Option 1: Enrollment Guide – Contains all enrollment forms and investment fund information package. This option incurs a one-time fee (see Schedule B of RCG Service Agreement).

Option 2: Enrollment Forms – Contains all forms for enrollment but NO investment information. The Advisor is responsible for obtaining investment information. This option is free of charge.

Prospectuses and other descriptive investment option information is the responsibility of the Investment Advisor.

STEP 5: Payroll Training

A time will be set up with the client to schedule the training for the payroll submission process.

Need more information?

Plan sponsors and financial advisors are encouraged to speak with an *EZ* K Plan™ representative.

Visit: **www.ezkplan.com** Call: **877-254-7085** Email: **ezk@revzonconsulting.com**
Fax: **781-343-0757**

Timeline for a New *EZ* K Plan™