

Benefit Plans Plus, LLC

Fiduciary Health CheckSM

Document Checklist

To get your Fiduciary Health CheckSM started, please provide the following information:

- Plan documents
 - Adoption agreement
 - Summary plan description
- 5500 (Most recent filing)
- Current employee communication(s)/Notices
- Vendor service agreement(s)
- Compliance testing (Most recent)
- Fiduciary or Fidelity Bond Insurance coverage

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