

RETIREMENT CONVERSION TIMELINE SPECTRUM

ASAP
Spectrum Questionnaire and all data submitted to

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TBD

4 - 6 WEEKS

7

TBD

9

Spectrum. Plan transfer request made to previous recordkeeper.

2 - 4 WEEKS

New Spectrum Service Agreement and Plan Documents sent to you via Docusign for electronic signature.

Transfer of asset date assigned by previous recordkeeper.

30-day notice provided to you by Spectrum for distribution.

4 - 6 WEEKS

New Consulting Agreement and Investment Policy
Statement sent via ZohoSign for electronic signature.

Employee materials provided and educational webinar scheduled with Payentry.

TBD 45 - 90 DAYS

Effective date of new plan assigned by Spectrum.

First payroll contributions sent to Spectrum via

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TBD 45 - 90 DAYS

Transfer of assets from previous provider to Spectrum.

Spectrum plan sponsor website training scheduled at your convenience.

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