



Payentry®

RETIREMENT START-UP TIMELINE SPECTRUM

Typical Implementation timeline is between 60-90 days once the questionnaire and all documentation have been submitted.

2 - 4 WEEKS



Service Agreement, Plan Document, ACH and Online Access Agreements sent by Spectrum via DocuSign for electronic signature.

1

4 - 6 WEEKS



Consulting Agreement and Investment Policy Statement sent by Payentry via ZOHOSign for electronic signature.

2

8 - 10 WEEKS

(JUST PRIOR TO EFFECTIVE DATE)



Enrollment materials provided and employee education meeting scheduled.

3

*8 - 10 WEEKS



Effective Date with Spectrum.

4

FIRST CHECK DATE AFTER
EFFECTIVE DATE



First payroll contributions sent to Spectrum.

5

FOLLOWING EFFECTIVE DATE



Schedule Spectrum website training at your convenience.

6

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