



401(k) Checklist for PEOs

- () List your providers.
- () Match your provider listed above to the service they provide:
 - Plan Administration -
 - Custodian -
 - Record keeper -
 - Fiduciary Service -
 - Advisory Service -
- () List the date you last time you benchmarked your service provider fees or reviewed your plan scorecard.
- () Identify why you work with your providers including compliance, low fee, ample investment selection, authentic customer service, etc.
- () List the participation rate in your MEP.