

Group Plan Subgroup Paygroup Group: 45576 Plan: 001

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- Setup & Review Notes

Group Name: SCHOOL ADMIN OF MT Group Region: 025
 Plan Legal Name: Plan Type: TSA
 Plan Name (internal user only): NO FLOW SINCE 04; NO DOC REQD Plan Status: I

Plan Overview

Plan Basic Information

Mailing & Withholding

Plan Billing

Services

Deferral

Contribution Sources

Products

Funds

Allocation Models

Loans

Fees

Location

TPA

Distributions

Service & Vesting

Online Enrollment Access

Notification Center

Plan Basic Information

Plan Number: 001
 Plan Type: TSA
 Individual/Employer Sponsor Plan Indicator: ER Sponsored(G)
 Plan Name: NO FLOW SINCE 04; NO DOC REQD (internal use only)
 Self Service Plan Display Name: Tax Sheltered 403(b) (this name will appear externally)
 Plan Legal Name:
 Rollovers: N - No Rollovers Accepted
 Employer Maintains Beneficiary: No
 Valic Exclusive Provider:
 Revenue Sharing Participation: Not Participating
 Revenue Sharing Frequency: N/A
 Revenue Sharing Start Date:
 Revenue Sharing End Date:

Contract Date: 8/17/1990 Plan Setup Date: 8/17/1990
 SBS Code / Plan ID: / Effective Date:
 Side by Side Default:

Mutual Fund Schwab Plan ID:
 Annuity Schwab Plan ID:
 PCRA Annual Maintenance Fee(\$): 0
 Include Fixed Investment: No
 PCRA Model: Old

Admin Last Name:
 Admin First Name:
 Admin Email Address:

Trustee Last Name:
 Trustee First Name:

Admin Address Code:

Trustee Address Code:

Grid Exclude: No
 I - Inactive
 Plan Status: Inactive

ABC Exclude: No
 Plan Year End: 00 / 00

Pension Indicator:
 ERISA 5500: No
 ERISA REA: No

Distribution Restrictions: 5 - Yes
 Market Size: 3
 Compliance Services Fee: 0 (xxx.xx)

Minimal Spousal Percentage: 0

Independent Plan Fiduciary Name:
 Address Line1:
 Address Line2:
 Address Line3:

Owner Only Plan: No
 Fiduciary Exception Type: N/A

Independent Plan Fiduciary Signature Date:
 Selection and Monitoring Assistance: None
 Plan Disclosure Issue Date:
 Investment Policy Statement Receipt Date:
 Line of Business: TS - TSA

City:
 State:
 Zip:
 Phone:
 IPF Start Date:

Finders Fee: 000

Closed to New Sales IPF End Date:

Income Lock/Plus:

ER Initiated Event: No

Contract Holder Fee: No

Premium Bonus CIN: No

Premium Bonus Flow: No

Fiduciary Service Provider: N/A

Services: N/A

Platform: N/A

Admin Hardship Suspension: No

Auto Recommence: No

Suspension Period: 0

Apply Hardship Suspension To: None

Specified Contribution Sources:	CS Type	Description	Applies?
	1	EMPLOYEE DEFERRALS	No

Auto Enrollment/Auto Increase: Does Not Apply

Services:

VALIC Sends Annual Auto Enrollment Notice: Does Not Send

Annual Notice Timeframe:

QDIA Applies: No

VALIC Sends QDIA Notice: Does Not Send

GPS: Yes

RetireFit: No

File Processing Platform: Other

Compensation Year End: 00 / 00

Compensation Year Begin: 00 / 00

Last Amendment Date:

Fiscal Year End: 00 / 00

Relius Status:

Relius Platform Date:

Relius Plan ID:

Send Plan Data to Relius

PWSAWSVANET01.

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