



Qualified Plan Takeover Checklist

Please provide the following documentation to The Raymond Company Pension Services, LLC in order to transition the administration of your qualified plan.

- Copy of the Plan Document or Adoption Agreement with Basic Plan Document
- Copy of any Plan Amendments
- Copy of IRS Opinion Letter for the Basic Plan Document (if applicable)
- Copy of IRS Determination letter (if applicable)
- Copy of most recent Form 5500
- Copy of most recent annual valuation computer work provided by your administrator
- Copy of all investment statements or trust report as of the last day of the prior Plan Year
- Copy of Promissory Note and Amortization Schedule for any participant loan (if applicable)

Please send the documents via mail/fax/e-mail to:

Mail: 4545 E. Southern Ave. #108 • Mesa, AZ 85206
Fax: (480) 289-3475
E-mail: tim@raymondcompany.net