

TIGER'S EYE BENEFITS CONSULTING

Takeover Data Retrieval Checklist

Please provide the following information/materials regarding your existing qualified retirement plan:

- Plan document including Summary Plan Description (SPD), prototype Adoption Agreement (if applicable), IRS approval letter (if applicable)
- Any prior IRS Determination Letters for previous Plan document versions (if they exist)
- Latest form 5500 completed and filed for the Plan
- Latest annual reporting compiled by previous TPA. This reporting may include:
 - Employee census and other demographic information
 - Results of IRS compliance testing for the year reported
 - Contribution summary(ies) for the year reported
 - Vesting information
- Most recent Employee census data provided to previous TPA
- Plan investment information with existing vendor

Please complete the attached Employer Information Sheet with information specific to the business entity sponsoring the retirement plan. Tiger's Eye Benefits Consulting appreciates the opportunity to be of service to you.