



Access Plan Forms and Documents for Enrolling Employees

Documents

Reports

Forms and Documents

Select **Forms and Documents** from the menu.

Sponsor Forms and **Participant Forms** links can be found on the top half of the webpage.

To generate an **Enrollment Flyer**, select **Generate Forms** from the dropdown.

Select **Online Enrollment Flyer** under the **Forms Selection** section.

Click **SUBMIT**.

Forms and Documents

Generate Forms

Generate Forms

View Documents

None

Form Selection

Beneficiary Designation Form
To be completed by Participant & sent to RPC. **Must use paper form when Spousal Consent required

Formulario de designacion de beneficiario
Para ser completado por el participante y enviado a RPC. ** Debe usar un formulario en papel cuando

Online Enrollment Flyer
Generate flyer for employee online enrollment instructions.

Rollover Exchange Request Form
To be completed by Participant to consolidate other accounts to this account.

Options

Divisions
All Divisions

Select employee
All Employees

Select export file type
Adobe Acrobat (PDF)

SUBMIT

You can also direct participants here: <https://retirementplanconsultants.info/plan-participant-resource-center/> for an online enrollment guide with step-by-step instructions.



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For documents that have been previously generated, such as the **404(a)(5) Fee Disclosure**, **404(a)(5) Investment Comparative Chart**, and **Summary Plan Description**, select **View Documents** from the dropdown.

To download a document, click the link under the **Document/Form Name** column.

Select Forms

View Documents

Generate Forms

View Documents

Document/Form Name

CLEAR RESULTS

Document/Form Name	Document/Form Group	Employer	Created	Last Visited
2024 3rd Qtr WM Preferr...	Plan Documents	0 Demo Retirement Plan	10/30/2024	08/05/2024