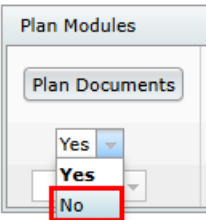


Delete Plan

12/05/2025 9:57 am CST

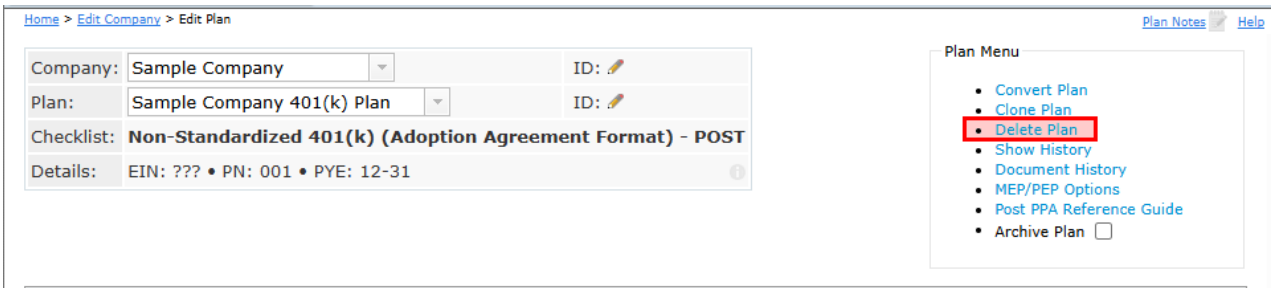
Deleting a plan will permanently remove the plan from the system, as well as all completed forms and filings. If you might need access to the plan again in the future, we recommend you mark the plan as not responsible for. You can mark a plan as not responsible from the Edit Plan page. Under "Plan Modules" select "No". The plan will no longer pull into batch features or reports.



The screenshot shows a 'Plan Modules' section with a 'Plan Documents' dropdown menu. The dropdown is open, showing 'Yes' and 'No' options. The 'No' option is highlighted with a red box.

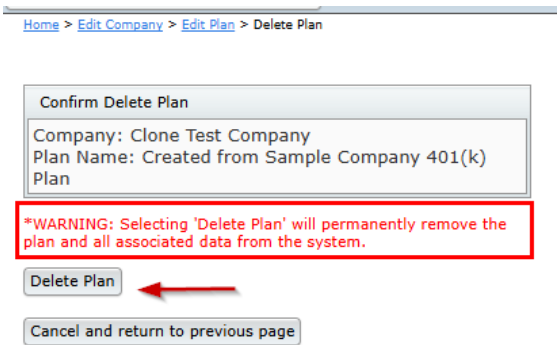
In addition, you can convert the plan to a Misc. checklist from a document checklist. Refer to "Convert Plan" for steps in converting a document checklist.

If you have determined that the plan can be deleted (e.g. duplicate plan with no history), click on the "Delete Plan" link under the Plan Menu on the Edit Plan page.



The screenshot shows the 'Edit Plan' page. The 'Plan Menu' is open, showing options: 'Convert Plan', 'Clone Plan', 'Delete Plan' (highlighted with a red box), 'Show History', 'Document History', 'MEP/PEP Options', 'Post PPA Reference Guide', and 'Archive Plan'.

Confirm that you want to delete the plan by clicking on the "Delete Plan" button. Once a plan has been deleted, this transaction cannot be undone.



The screenshot shows the 'Confirm Delete Plan' dialog box. It contains the following information: Company: Clone Test Company, Plan Name: Created from Sample Company 401(k) Plan. Below this, a red box contains the warning: '*WARNING: Selecting 'Delete Plan' will permanently remove the plan and all associated data from the system.' At the bottom, there are two buttons: 'Delete Plan' (highlighted with a red box and a red arrow) and 'Cancel and return to previous page'.

