

Checklist Type

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All plan documents are associated with a checklist type depending on the document packages you have purchased.

- **Retirement Plan Documents:**

- Standardized 401(k) (Adoption Agreement Format)
- Non-Standardized 401(k) (Adoption Agreement Format)
- Non-Standardized 401(k) (Adoption Agreement Format) - Answers Only
- Non-Standardized 401(k) (ID Format)
- Non-Standardized Money Purchase
- Non-Standardized Governmental Money Purchase
- Non-Standardized Governmental Profit Sharing
- Non-Standardized Employee Stock Ownership Plan w/401(k)
- Non-Standardized Defined Benefit Pension Plan (Adoption Agreement Format)
- Non-Standardized Defined Benefit Pension Plan (ID Format)
- Non-Standardized Cash Balance Plan (Adoption Agreement Format)
- Non-Standardized Cash Balance Plan (ID Format)
- Non-Standardized 403(b) Church w/RIA
- Non-Standardized 403(b) Church w/out RIA
- Non-Standardized 403(b) Deferral Only 501(c)(3)
- Non-Standardized 403(b) ERISA
- Non-Standardized 403(b) Governmental

- **Non-Qualified Plan Documents:**

- Section 457(b) Plan
- Section 409A Plan

Note: *If you have not purchased a plan document module you will only have access to the 'Misc' plan checklist type. Plans using the Misc. checklist have access to the General Information section on the Edit Plan page. Plans using the Misc. checklist can still be used for all modules except the Plan Documents module.*
