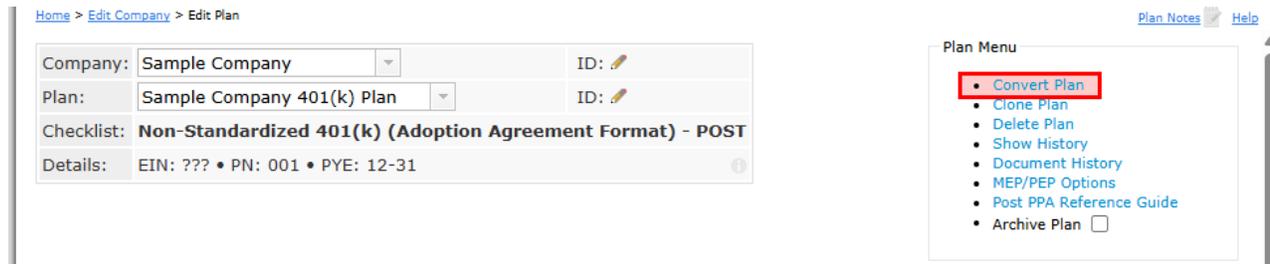


Convert Plan

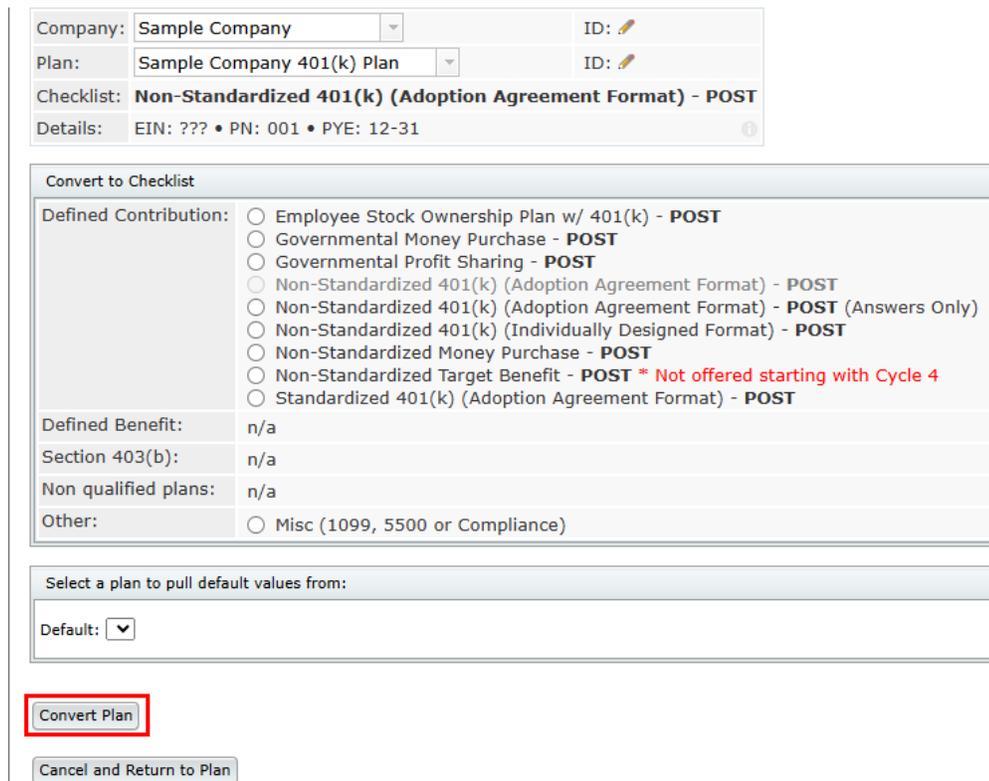
03/02/2026 2:47 pm CST

To convert a plan to a different checklist type, click on the "Convert Plan" link located under the Plan Menu on the Edit Plan page.



The screenshot shows the 'Edit Plan' page. At the top left, there is a breadcrumb trail: Home > Edit Company > Edit Plan. Below this is a form with the following fields: Company: Sample Company (dropdown), ID: (edit icon); Plan: Sample Company 401(k) Plan (dropdown), ID: (edit icon); Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST; Details: EIN: ??? • PN: 001 • PYE: 12-31 (info icon). On the right side, there is a 'Plan Menu' with the following options: Convert Plan (highlighted with a red box), Clone Plan, Delete Plan, Show History, Document History, MEP/PEP Options, Post PPA Reference Guide, and Archive Plan (checkbox).

On the next page, you can select your desired checklist type. Click on "Convert Plan" button.



The screenshot shows the 'Convert to Checklist' dialog box. It has the same header information as the previous screenshot. The main section is titled 'Convert to Checklist' and contains a list of radio button options for 'Defined Contribution': Employee Stock Ownership Plan w/ 401(k) - POST, Governmental Money Purchase - POST, Governmental Profit Sharing - POST, Non-Standardized 401(k) (Adoption Agreement Format) - POST, Non-Standardized 401(k) (Adoption Agreement Format) - POST (Answers Only), Non-Standardized 401(k) (Individually Designed Format) - POST, Non-Standardized Money Purchase - POST, Non-Standardized Target Benefit - POST * Not offered starting with Cycle 4, and Standardized 401(k) (Adoption Agreement Format) - POST. Below this are fields for 'Defined Benefit: n/a', 'Section 403(b): n/a', 'Non qualified plans: n/a', and 'Other: Misc (1099, 5500 or Compliance)'. At the bottom, there is a section 'Select a plan to pull default values from:' with a 'Default:' dropdown menu. A red box highlights the 'Convert Plan' button, and another red box highlights the 'Cancel and Return to Plan' button.

All checklist questions will be copied to the selected checklist (where possible). You will be provided with a list of incompatible checklist questions if there are any. After completing the conversion, it is recommended that you review the checklist, run the edit checks and update where applicable.