

Retirement Agreement

Circle One

Does your company currently have a retirement plan?

Y N

What kind of retirement plan do you have? (ex: 401k, Roth, Simple, Sep, etc.) _____

****PLEASE PROVIDE A COPY OF PLAN DOCUMENTS****

Would you like us to submit your retirement on your behalf?

Y N

Will your submission be online?

Y N

****There is a fee of \$15.00 per pay for online submissions**

****If yes, please include website and log in information. We will not be able to submit any information for you until we have access to your online account.**

Website Address: _____

Log In Name / User ID: _____

Password: _____

****EPRG is not responsible for maintaining employee information, such as adding new employees or removing terminated employees.**

If your retirement is paid via check that we issue, will EPRG be responsible for mailing the check on your behalf?

Y N

****If yes, please provide the vendor name and mailing address. We will not be able to issue any checks until this information is provided**

Vendor Name: _____

Vendor Address: _____

City, State, Zip Code: _____

By signing this form, I am stating that all information is true to my knowledge. If any information should change, it is my responsibility to notify my payroll provider.

Signature: _____

Title: _____

Date: _____