

KEEP YOUR RETIREMENT PLAN TUNED UP.



Follow the terms of your plan.

- ☐ Your plan document is your road map to proper contributions and distributions.



Coordinate with service providers.

- ☐ Pass along the latest payroll information.
- ☐ Make sure your provider knows the key rules of your plan.



Update your plan to reflect law changes.

- ☐ Sign all amendments.



Review your plan operations annually.

- ☐ Use the checklists at www.irs.gov/retirement to avoid common mistakes.



Make timely repairs.

- ☐ Correct mistakes as soon as they're discovered using IRS correction programs.



Learn more now at:
WWW.IRS.GOV/RETIREMENT