

# Shift fiduciary, administrative and operational burdens from your organization to ours

| Employer Responsibilities Under a Traditional Single Employer Plan  | Employer Responsibilities Under the PTC Multiple Employer Plan (MEP)  |
|---|---|
| <ul style="list-style-type: none"><li>• Establish Plan Provisions</li><li>• Appoint Plan Administrator</li><li>• Plan Document Administration</li><li>• Administer Plan Provisions</li><li>• Determine &amp; Monitor Eligibility</li><li>• Plan Operational Oversight &amp; Compliance</li><li>• Government Filings &amp; Tax Reporting</li><li>• Compliance Testing</li><li>• Forfeitures &amp; Suspense Accounts</li><li>• Plan Audit</li><li>• Approve Loans, Distributions, Terminations, QDROs</li><li>• Participant Notices, Statements &amp; Disclosures</li><li>• Initial &amp; Ongoing Employee Education</li><li>• 404(c) Compliance (when applicable)</li><li>• Appoint Investment Committee (optional)</li><li>• Develop Quantitative &amp; Qualitative Investment Process</li><li>• Establish &amp; Maintain Investment Policy Statement</li><li>• Select Investments</li><li>• Ongoing Monitoring of Investments</li><li>• Remove &amp; Replace Investments</li><li>• Service Provider Selection &amp; Oversight</li><li>• Annual Plan Review &amp; Valuation</li></ul> | <ul style="list-style-type: none"><li>• Provide accurate payroll and other data</li><li>• Make timely contributions</li><li>• Monitor fiduciary service provider(s)</li></ul>  |

For more information, contact Al Gusky at the Pittsburgh Technology Council [agusky@pghtech.org](mailto:agusky@pghtech.org) or 412.918.4211