



Instructions for opening a new EZ B Plan™ 403(b)

Complete and submit the New EZ B Plan™ 403(b) Set-up Form.

Feel free to call us toll-free at **877-254-7085** if you have any questions while completing the set-up form.

STEP 1: Application

The completed New EZ B Plan™ 403(b) Set-up Form along with a check for the one-time application fee of \$100 should be mailed to:

Revzon Consulting Group, LLC
Attn: EZB Services
465 Furnace Street, Suite 6
Marshfield, MA 02050

STEP 2: Plan Design

Once the Revzon Consulting Group has received the completed New EZ B Plan™ 403(b) Set-up Form you will be contacted to set up an introductory call to review the plan design. At this time you will be asked to complete the following forms:

- Fund Line-up
- Company Census
- Custodial Agreement
- ACH Sheet
- Portfolio Sheet (if applicable)
- RCG Services Agreement

Links to these documents can be found at <http://www.ezbplan.com>.

STEP 3: Plan Establishment

It will take approximately 2 weeks to set up the plan and produce the plan documents along with the ancillary forms. Completed plan documents will be sent to you along with detailed instructions. At this time, the fund line up and census forms need to be submitted in order to proceed to step 4.

STEP 4: Participant Enrollment - Participants may enroll in the plan by one of two methods

The first method is on-line enrollment and is free. After the sponsor has submitted the census, Personal Identification Numbers along with the participants account number will be sent via email to the sponsor for distribution to the participant. The participant will log onto the website site, access their account, and enter their deferral percent (whole percent) and their investment choices (whole percent). A deferral report will be sent to the employer for use in setting up their payroll file.

The second method, Manual Enrollment (input by record keeper), has a base fee of \$50. plus a \$5./participant fee (billed to the employer). When Manual Enrollment is selected there are two options available:

- Option 1: Enrollment Guide – Contains all enrollment forms and investment fund information package. This option incurs a one-time fee (see Schedule B of RCG Service Agreement).

Option 2: Enrollment Forms – Contains all forms for enrollment but **NO** investment information. The Advisor is responsible for obtaining investment information. This option is free of charge.

Prospectuses and other descriptive investment option information is the responsibility of the Investment Advisor.

STEP 5: Payroll Training

A time will be set up with the client to schedule the training for the payroll submission process.

Need more information?

Plan sponsors and financial advisors are encouraged to speak with an EZ B Plan™ representative.

Visit: www.ezbplan.com

Call: **877-254-7085**

Email: ezb@revzonconsulting.com

Fax: **781-343-0757**

EZ B Plan™ is a product developed and sponsored by Revzon Consulting Group, LLC, 465 Furnace Street, Suite 6, Marshfield, MA 02050. Aspire Financial Services, LLC provides the recordkeeping and related administration under contract with Revzon Consulting Group, LLC. Matrix Clearing and Settlement Services along with MG Trust, both subsidiaries of Broadridge Financial Solutions, Inc. provide the execution and settlement of the plan level mutual fund trades and holding the mutual fund shares on behalf of the respective 403b plan trust. Financial advisors through their respective broker dealers provide the plan investment guidance and educational services to employees. Certain third party RIA firms are available to provide 3(21) or 3(38) services on an optional basis.

Timeline for a New EZ B Plan™

RCG Responsibility

Week Two
Schedule Plan Design Call

Week Three & Four
Plan Establishment, Deliver Plan Documents to Advisor

Week Six
Conduct Payroll Processing Training

New EZ B Plan™

Advisor Responsibility

Week One
Submit Application & Check

Week Three & Four
Complete and submit ALL Applicable Plan Design Forms

Week Five
Enrollment Meetings & Participant Enrollment

Week Seven
Plan is Live, Website is Available to Participants & Sponsor

Weeks

1 2 3 4 5 6 7