



We offer our clients a participant level website that is dedicated to communicating retirement plan information directly and automatically to employees. Retirement Plan Documents for You (RPD4U) is mobile and tablet friendly, so employees can access their retirement plan information at their convenience. This feature is especially convenient for communicating plan information, such as safe harbor notices and Summary Plan Descriptions (SPD), just to name a few. The website also has the ability to document employee enrollment and monitor the successful receipt of email notifications.

When clients decide to sign up for this service, employees are automatically enrolled. After the enrollment is complete, employees receive an email announcing the availability of newly uploaded information. Plan sponsors are required to use the most appropriate form of distribution and/or communication to ensure successful delivery when relaying plan notices to employees. There is no guarantee that RPD4U is the most acceptable form of initial distribution for required notices, however, it may be used as a portal for maintaining employee communications.

