



Are your clients paying too much in 401(k) fees? Find out with an annual plan review

The IRS recommends 401(k) plan reviews once a year to uncover administrative errors and whether participants are paying too much in fees. Offering an annual plan review to your clients can give you a competitive edge and add consultative value to your services.

For more details, don't miss our **Oct. 19 webinar: Annual 401(k) Plan Reviews: What Financial Advisors Need to Know.**

Our retirement plan experts will discuss:

- The critical elements that should be examined in an annual review
- Recent legislation impacting the retirement environment
- The latest types of plan options
- Consultative strategies and resources for your practice



[Register for webinar here](#)

Contact your regional wholesaler to learn more

Wholesale401k@paychex.com

paychex.com/partnerships/financial-advisors/wholesaler

855-588-4775

Resource Corner

Compliance Reminder

Oct. 17: Form 5500 filing extension deadline

Oct. 31: Review periodic test

Nov. 1: Amendment deadline for following plan year

Month of November:

Conduct annual plan reviews

Partner With Paychex:

[Paychex.com/advisors](https://paychex.com/advisors)

Exclusively for financial advisors: clients you refer to Paychex between Sep. 1 and Dec. 31 will get **3 months of free** administration and participant fees

State Mandated Retirement

Many states are requiring employers to offer retirement savings programs. What's happening in your clients' states?

[Visit our online resource](#) for state mandated retirement.