

# 5 QUICK STEPS YOU CAN TAKE TO KICK START YOUR NEW RETIREMENT PLAN

**Congratulations on your new ADP retirement plan. As a new plan sponsor, you may need some extra guidance and support on how to successfully manage your plan. Don't worry. ADP is here to help you every step of the way. We've created a comprehensive library of how-to-guides, plan sponsor education videos, articles and more.**

## **Get to know the Plan Sponsor Website**

The Plan Sponsor Website ([www.mykplan.com/sponsor](http://www.mykplan.com/sponsor)) provides you with a bird's eye view of your plan. You can review important plan analytics, update employee eligibility information, view plan activity and stay on top of key administrative and compliance tasks. To help you get started, [download](#) our user guide.

## **Mark your calendar with key compliance dates**

As a plan fiduciary, you're required to file your plan's Form 5500 each year. The good news is that ADP will prepare your Form 5500 and post it to the Plan Sponsor Website in mid to late May, giving you plenty of time to review and file your Form 5500 by the July 31st deadline. Plus, our intuitive filing experience makes it so easy to complete this task, it takes just a few minutes.

In mid-January, ADP will run your plan's year-end compliance tests and post them to the Plan Sponsor Website. You'll need to review your test results and take corrective action, if required. Don't worry, our intuitive Compliance Summary will guide you through the entire process and provide access to helpful resources.

We'll send you email reminders as the dates get closer.

## **Learn the ins and outs of employee maintenance**

One of the most important aspects of being a plan sponsor is ensuring that your employee data is accurate. This is because employee data such as date of birth, hire date and hours worked

help determine who is eligible for your plan. Fortunately, the Plan Sponsor Website makes it easy for you to review employee data, pending eligibility for both full time and part-time employees and Rehired Employees. To begin, simply sign in to the site and select Employees from the left navigation. Please note that certain updates can only be made in your RUN payroll system.

[Register](#) for our instructor-led training even to learn more.

## **Register for our instructor-led plan sponsor training events**

If you're a new plan sponsor, or just new to ADP, we recommend that you take full advantage of our instructor-led training sessions. During these virtual classes, our instructors will show you how to complete administrative and compliance tasks, employee maintenance and more. Plus, you'll have the opportunity to ask questions. [Click here](#) to register.

## **Bookmark our Plan Sponsor Resource Hub**

The ADP Plan Sponsor Resource Hub (<https://psresources.adp.com>) gives you access to a comprehensive library of user-friendly resources at your disposal – anytime, anywhere. These resources are designed to help you successfully manage your retirement plan. You'll find how-to guides, brochures, videos and more. You'll also be able to access our training resources, including ADP Engage, where you can learn more about your fiduciary responsibilities. Book mark the page today.



**Need more help?** Our knowledgeable Client Services Representatives are here to answer your questions. You can reach them by phone or through our Chat feature right on the Plan Sponsor Website.

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