QUARTERLY RECAP
of Summer 2018

Here is the MVP Quarterly Recap of Summer 2018! This quarter has some very practical help and teasers for the future!

- Plan Sponsor and Advisor Contacts – What to do when someone leaves
- Plan Sponsor Payroll Notifications
- What's Coming!
- Employee Spotlight

Remember to check out some great information online!

- www.mvp401k.com – go to Education and you will find the following
  - ✓ Bi-monthly newsletter – in-depth and helpful retirement plan information
  - ✓ Blogs
  - ✓ Articles
  - ✓ Whitepapers
  - ✓ Did You Know…? – A brief answer to this question with a new topic every week!
- LinkedIn
- Twitter
- Facebook
- System-generated emails – these are critical to helping you navigate your fiduciary responsibilities under ERISA.

Plan Sponsor and Advisor Contact Changes

One easily overlooked, but very important "to do" for our clients and the advisors we work with is this – please let us know immediately once someone leaves your company who had access to client data. This could be, for example, a change in:

- Payroll contact
- Fiduciary
- CPA
- Advisor
- Head of HR
- Office Manager
- Anyone who was granted authority to access participant account information

For any change in such personnel, please contact your Relationship Manager at MVP. Let her know who and what changes need to be made. This includes changes, additions, and deletions to access. We will need to know the name of the person and, for those being added, their phone number, email address, and what they should have access to.

This is very important since your former employee will have access to proprietary information like Social Security Numbers, participant addresses, account balances, etc… If you do not know exactly who has access, please contact your Relationship Manager. She will tell you who does have access.

Plan Sponsor Payroll Notifications

Each payroll contact for each of our clients receives emailed payroll notifications when a payroll is one day past due. This email will continue for a total of 5 days before it stops. If you know that a payroll was late when you submitted it and you did not receive an email, please check your "spam" filter since these are system generated emails. The email comes from the email address mvp@mvp401k.com. Below is what that email looks like:

SchARP Payrolls - Data past due (As of 10/04/2018)

Plan	Division	Payroll Date	Payroll Due	Funding Due	Note
MVP Plan Administrators Inc	0	09/30/2018	10/01/2018	10/02/2018	4 days late
MVP Plan Administrators Inc	M	09/30/2018	10/01/2018	10/02/2018	4 days late

If you receive this, please login to upload your payroll data, see that the responsible person in your company or at your payroll provider does so, or contact your Relationship Manager if you have questions about this.

We are in process of re-verifying that all payroll contacts are setup. Again, it is important to notify us of a change to a payroll contact so that you can be informed timely of the need to upload these payrolls.

What's Coming?!

Here is a sneak peek at what is coming in Q4 2018 and Q1 2019:

- Even more security enhancements – we will never stop being vigilant!
- Payroll integration with certain providers
- Responsive Participant Web
- As mentioned, thorough review of all payroll notifications
- Email communication about timely deposit of employee deferrals

Employee Spotlight

Our Employee Spotlight this quarter belongs to Karissa Moss. She was hired and trained to be a Relationship Manager. Karissa graduated from UNC-Wilmington with a BA in Finance. She held multiple internships in the financial services industry throughout college. She has spent most of 2018 training and studying for the role of a Relationship Manager. Her dedication and commitment to her work, communication, and overall service to her clients is already evident. She has stepped into this role with a desire to deliver the very best for everyone. We are excited and glad to have her part of our team! To read more about Karissa and other team members, you can visit our site's Staff page: http://mvpplanadmin.com/who-we-are/staff/.