



ON BOARDING DETAILS AND NEXT STEPS

STEP 1

NEW RETIREMENT
PLAN

- Completed Trinity sales paperwork
- ACH payment/retainer

STEP 2

EXISTING
RETIREMENT PLAN

- Completed sales paperwork
- ACH payment/retainer
- Copy of current plan document

STEP 3

ON BOARDING
TO TRINITY

- Welcome email from Eric Long - On Boarding Manager
- Plan communications
- Notices for plan participants
- Introduction email to dedicated Relationship Manager

STEP 4

DEDICATED
RELATIONSHIP
MANAGER

- Call/email to schedule plan document review with the plan sponsor and Financial Advisor
- Final document is drafted and emailed through docusign for plan sponsors signature
- The dedicated relationship manager is your ongoing plan consultant

DISCLAIMER: **We are waiting on the client to give us the disclaimer language.