

Plan Sponsor Link Guide

Plan Sponsor Link is a software program that allows easy and streamlined access to information

about your plan. The software has many uses.

1. It is a place to access the tasks that you need to complete for your plan.
2. It allows you to submit your year end data for your plan
3. It acts as a portal for your plan documents and related forms. We also post all quarterly valuations and Form 5500 packages to the site.
4. The software also allows you to upload and download secure files, eliminating the need for attaching passwords to files that were previously sent through e-mail.

Questions?

Please call us toll-free at 1-888-657-0702

Monday—Friday 8 AM—4:30 PM

Or email ContactUs@NobleDavis.com



Accessing Plan Sponsor Link

Log in: Go to www.nobledavis.com and click on **Plan Logins** in the upper right hand corner.



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Plan Logins




NOBLE-DAVIS CONSULTING, INC.

helps companies to design and maintain their retirement and welfare plans. Since 1987, we've been taking responsibility for your retirement and welfare plans so you can focus on your business. We make your plan smart, simple and worry-free.

Sponsors:



[Your Plan Access Login](#) |  [Guide](#)
(Payroll upload and plan activity)

[Plan Sponsor Link Login](#) |  [Guide](#)
(Plan information and file uploads)



Retirement Plan Compliance Specialists

Username

Password

Remember My Username

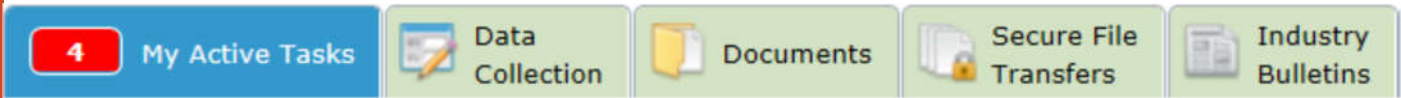
Sign In

[Forgot password?](#)

[First time user?](#)

The first time you access the site, you will need to click the "First time user?" link below the sign in button. Enter your e-mail address and click "Submit" to receive your temporary password. This will allow you to enter the site and view your plan information. If you forget your password, you can click on the "Forgot Password" link to obtain a new password.

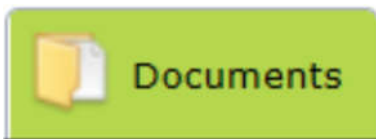
Plan Sponsor Link



If you have items to look at or process, the “My Active Tasks” tab will list them all. Most items posted to your plan will show up in this tab so you are aware they are new. Simply press on the “Download” button next to the document and it will disappear



The “Data Collection” tab displays information relating to your annual information requests. So, at the end of your plan year, you will be directed to answer your questions online and upload your census data.



Your plan documents, compliance reports, and various administrative forms are posted to the “Documents” tab. This is great place to store current documents and plan valuations as well as accumulate your historical documents. It is also a handy reference when it is time to enroll a new participant into the plan or if a participant needs a copy of an existing form.



The “Secure File Transfer” tab allows us to communicate securely— no more e-mailed payroll files and no more complicated passwords to remember. Now, it’s as easy as clicking the “Send a File” button and choosing the person you want to receive the file. The file will then show in your “Sent Files” list and will show up on our software immediately.

Attention Retirement Plan Partners

You will be able to access the site with your e-mail as well following the same steps as the Plan Sponsor. You will then have access to any of your plans on the portal (for which you have been assigned viewing rights). We will automatically post all of your courtesy copies of valuations/statements to this portal.