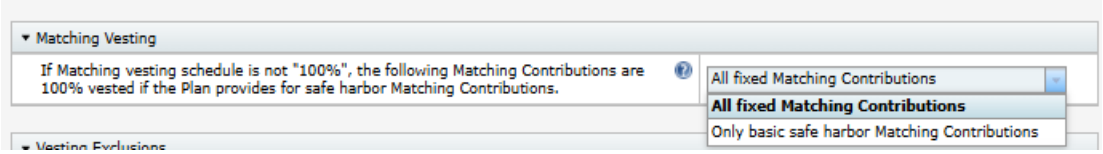
4.5. Vesting

09/19/2025 2:18 pm CDT

The vesting section is where certain vesting related settings can be found, such as vesting service computation method, computation period and vesting exclusions. Additionally, this is where the global option to override prior years of cumulative years of vesting service can be set.

Note regarding Matching Vesting: If the plan has Safe Harbor Match, but has discretionary Matching sources with something other than immediate vesting, make sure to set "If Matching vesting schedule is not "100%", the following Matching Contributions are 100% vested if the Plan provides for safe harbor Matching Contributions." to "Only basic safe harbor Matching Contributions".



This section does not contain vesting schedules. Those are in "Work with Sources/Inv Accounts" section of Plan Specifications. For specific information regarding each option in this section click the applicable help text bubble.

