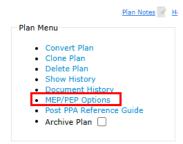
Set-Up Master Plan

12/05/2025 9:21 am CST

From the "Edit Plan" page of the plan you wish to designate as the Master Plan, click on the "MEP/PEP Options" link located under the "Plan Menu".





Check the box "Master MEP/PEP" to designate this plan as the Master Plan. Then, choose the applicable Form 5500 filing: single filing or a filing for each Adopting Employer. Once you have made your selection, click on the "Save & Close" button.



A pop-up window of the "Status Update" will generate. Click "Ok".

