




# Generate Adopting Employer Joinder Agreement, Supporting Forms/Notices and Master Plan Documents

12/05/2025 9:30 am CST

To print the Joinder Agreement and any supporting forms/notices for your Adopting Employer(s), go to the print Plan Document page of your Adopting Employer.

1. From the Edit Plan page, click on the "Plan Documents" button.

[Home](#) > [Edit Company](#) > Edit Plan

Company:	MEP Tool Company 3	ID:	
Plan:	MEP/PEP Tool Sample Plan	ID:	
Checklist:	<b>Non-Standardized 401(k) (Adoption Agreement Format) - POST</b>		
Details:	EIN: ??? • PN: 001 • PYE: 12-31 • Linked: <a href="#">Master Plan</a> 		

Plan Modules				
<b>Plan Documents</b>	IRS Forms	5500 Forms	1099-R	Compliance
2024	2024	2024	2024	
Yes	Yes	Yes	Yes	Yes

2. Select the Joinder Agreement and any supporting forms/notices that apply to the provisions of your Adopting Employer.

Home > Edit Company > Edit Plan > Print Plan Documents Plan Notes Help

Company: MEP Tool Company 3 ID:

Plan: MEP/PEP Tool Sample Plan ID:

Checklist: **Non-Standardized 401(k) (Adoption Agreement Format) - POST**

Details: EIN: ??? • PN: 001 • PYE: 12-31 • Linked: [Master Plan](#)

Plan Documents Menu

[ftwPro Amend](#) [E-Signed Docs](#)

- Document Format: Word
- Print IRS Letter for This Plan (Other Plans)
- Global Document Print Settings
- DocPrint
- Edit Filenames: Level 1 | Level 2
- Override Global Filename ☐
- RK Form Type: None

Documents / Forms Select All / Deselect All

<p><b>Plan Document</b></p> <p><input type="checkbox"/> Adoption Agreement</p> <p><input checked="" type="checkbox"/> Joinder Agreement</p> <p><input type="checkbox"/> Basic Plan Document</p> <p><input type="checkbox"/> Trust Agreement</p> <p><b>Required Amendments *</b></p> <p><input type="checkbox"/> SECURE/CARES/CAA Amendment</p> <p><b>IRS Pre-Approval Letter</b></p> <p><input type="checkbox"/> IRS Opinion Letter **</p>	<p><b>Summary Plan Description</b></p> <p><input type="checkbox"/> Summary Plan Description</p> <p><input type="checkbox"/> Summary Plan Description - English Including Spanish Foreign Language Requirement</p> <p><input type="checkbox"/> Summary Plan Description - Spanish</p> <p><b>Highlights</b></p> <p><input type="checkbox"/> Plan Highlights</p> <p><input type="checkbox"/> Plan Highlights - Spanish</p> <p><b>Administrative Policies</b></p> <p><input type="checkbox"/> QDRO Procedures</p> <p><input type="checkbox"/> Funding Policy</p> <p><input type="checkbox"/> SECURE 2.0 Operation Checklist</p> <p><b>Model/Sample Amendments/Agreements</b></p> <p><input type="checkbox"/> LTPT Supplemental - Annual Notice</p> <p><input type="checkbox"/> LTPT Supplemental - SPD</p> <p><input type="checkbox"/> Consent</p> <p><input type="checkbox"/> Amendment</p> <p><input type="checkbox"/> Termination Kit non MP</p> <p><input type="checkbox"/> Cease Safe Harbor Amendment</p> <p><input type="checkbox"/> Cease Safe Harbor Amendment - Spanish</p>	<p><b>Forms</b></p> <p><input type="checkbox"/> Deferral Election Form</p> <p><input type="checkbox"/> Deferral Election Form - Spanish</p> <p><input type="checkbox"/> Bonus Deferral Election Form</p> <p><input type="checkbox"/> Self Employed Deferral Election Form</p> <p><input type="checkbox"/> Publicly-Traded Stock Notice</p> <p><input type="checkbox"/> Publicly-Traded Stock Notice - Spanish</p> <p><input type="checkbox"/> Beneficiary Designation</p> <p><input type="checkbox"/> Beneficiary Designation - Spanish</p> <p><input type="checkbox"/> Special Tax Notice</p> <p><input type="checkbox"/> Special Tax Notice - Spanish</p> <p><input type="checkbox"/> Distribution Election Form - QJSA</p> <p><input type="checkbox"/> Distribution Election Form - non-QJSA</p> <p><input type="checkbox"/> Distribution Election Form - Spanish</p> <p><input type="checkbox"/> Roth Certification</p> <p><input type="checkbox"/> Beneficiary Dist Election Form</p> <p><input type="checkbox"/> Coronavirus-Related Distribution Form</p> <p><input type="checkbox"/> Benefit Statement</p> <p><input type="checkbox"/> Notice of Multiple Statements</p> <p><input type="checkbox"/> 404(a) Annual Notice</p> <p><input type="checkbox"/> Blackout Notice</p> <p><input type="checkbox"/> Blackout Notice - Spanish</p>
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The Joinder Agreement document includes two Consent documents (if required by the companies). One for the Master Plan Sponsor, and one for the Adopting Employer to sign. Only the Adopting Employer is required to sign the Joinder Agreement page.

If using the adoption agreement format document/checklist, the Joinder Agreement will have an Addendum of the options applicable to the Adopting Employer.

#### ADDENDUM - Adoption Agreement

### ADDENDUM OPTIONS AVAILABLE IN MEP/PEP TOOL SAMPLE PLAN ADOPTION AGREEMENT FOR MEP TOOL COMPANY 3

If using the individually designed format document/checklist, there will not be an Addendum to the Joinder Agreement. To detail the parameters that are different than the Master Plan, you will want to update Section J.26 in the document checklist of your Adopting Employer.

26. Enter any custom text to appear if different provisions apply to Adopting Employers than those contained in Adoption Agreement (leave blank if none): **Agreed Further:**

Text entered here will populate in the Joinder Agreement as follows:

**AGREED FURTHER**, that, if applicable the following provisions will apply to the Adopting Employers in lieu of the provisions contained in the Adoption Agreement: [text from J.26].

To navigate back to the Master Plan or to a different Adopting Employer, click on the "Master Plan" link at the top in the "Details" row.

Home > [Edit Company](#) > Edit Plan

Company:	MEP Tool Company 3	ID:	
Plan:	MEP/PEP Tool Sample Plan	ID:	
Checklist:	<b>Non-Standardized 401(k) (Adoption Agreement Format) - POST</b>		
Details:	EIN: ??? • PN: 001 • PYE: 12-31 • Linked: <a href="#">Master Plan</a>		

Click on the plan under "Master Plan" to be directed back to the Master Plan's Edit Plan page. Click on the plan name under "All Linked Plans" to be directed to that Adopting Employer's Edit Plan page.

Adopting Employers x

Master Plan			
MEP/PEP Tool Test Company		<a href="#">MEP/PEP Tool Sample Plan</a>	

All Linked Plans					
	Company	Plan Name	Plan ID		Admin
<input type="checkbox"/>	Company	Plan Name	Plan ID	Error	Admin
<input type="checkbox"/>	MEP Tool Company 3	<a href="#">MEP/PEP Tool Sample Plan</a>			

To print documents for your Master Plan, go to the print Plan Document page of your Master Plan.

1. From the Edit Plan page, click on the "Plan Documents" button.

Home > [Edit Company](#) > Edit Plan

Company:	MEP/PEP Tool Test Company	ID:	
Plan:	MEP/PEP Tool Sample Plan	ID:	
Checklist:	<b>Non-Standardized 401(k) (Adoption Agreement Format) - POST</b>		
Details:	EIN: 99-9999999 • PN: 001 • PYE: 12-31 • Plans Linked: <a href="#">1</a>		

Plan Modules				
<a href="#">Plan Documents</a>	IRS Forms	5500 Forms	1099-R	Compliance
Yes	Yes	2024	2024	Yes

2. Select the Plan Documents and any supporting forms/notices that you normally provide to your Plan Sponsor.

**Plan Document**

- ☐ [Adoption Agreement](#)
- ☐ [Basic Plan Document](#)
- ☐ [Trust Agreement](#)

**Required Amendments \***

- ☐ [SECURE/CARES/CAA Amendment](#)

**IRS Pre-Approval Letter**

- ☐ [IRS Opinion Letter \\*\\*](#)

**Summary Plan Description**

- ☐ [Summary Plan Description](#)
- ☐ [Summary Plan Description - English Including Spanish Foreign Language Requirement](#)
- ☐ [Summary Plan Description - Spanish](#)

**Highlights**

- ☐ [Plan Highlights](#)
- ☐ [Plan Highlights - Spanish](#)

**Administrative Policies**

- ☐ [QDRO Procedures](#)
- ☐ [Funding Policy](#)
- ☐ [SECURE 2.0 Operation Checklist](#)

**Model/Sample Amendments/Agreements**

- ☐ [LTPT Supplemental - Annual Notice](#)
- ☐ [LTPT Supplemental - SPD](#)
- ☐ [Consent](#)
- ☐ [Amendment](#)
- ☐ [Termination Kit non MP](#)
- ☐ [Cease Safe Harbor Amendment](#)
- ☐ [Cease Safe Harbor Amendment - Spanish](#)

**Forms**

- ☐ [Deferral Election Form](#)
- ☐ [Deferral Election Form - Spanish](#)
- ☐ [Bonus Deferral Election Form](#)
- ☐ [Self Employed Deferral Election Form](#)
- ☐ [Publicly-Traded Stock Notice](#)
- ☐ [Publicly-Traded Stock Notice - Spanish](#)
- ☐ [Beneficiary Designation](#)
- ☐ [Beneficiary Designation - Spanish](#)
- ☐ [Special Tax Notice](#)
- ☐ [Special Tax Notice - Spanish](#)
- ☐ [Distribution Election Form - QJSA](#)
- ☐ [Distribution Election Form - non-QJSA](#)
- ☐ [Distribution Election Form - Spanish](#)
- ☐ [Roth Certification](#)
- ☐ [Beneficiary Dist Election Form](#)
- ☐ [Coronavirus-Related Distribution Form](#)
- ☐ [Benefit Statement](#)
- ☐ [Notice of Multiple Statements](#)
- ☐ [404\(a\) Annual Notice](#)
- ☐ [Blackout Notice](#)
- ☐ [Blackout Notice - Spanish](#)