

Convert Plan

12/05/2025 9:54 am CST

To convert a plan to a different checklist type, click on the "Convert Plan" link located under the Plan Menu on the Edit Plan page.

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

Company: ID:

Plan: ID:

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

Details: EIN: ??? • PN: 001 • PYE: 12-31

[Plan Notes](#) [Help](#)

Plan Menu

- **Convert Plan**
- Clone Plan
- Delete Plan
- Show History
- Document History
- MEP/PEP Options
- Post PPA Reference Guide
- Archive Plan ☐

On the next page, you can select your desired checklist type. Click on "Convert Plan" button.

Company: ID:

Plan: ID:

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

Details: EIN: ??? • PN: 001 • PYE: 12-31

Convert to Checklist

Defined Contribution:

☐ Employee Stock Ownership Plan w/ 401(k) - **POST**

☐ Governmental Money Purchase - **POST**

☐ Governmental Profit Sharing - **POST**

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

☐ Non-Standardized 401(k) (Adoption Agreement Format) - **POST** (Answers Only)

☐ Non-Standardized 401(k) (Individually Designed Format) - **POST**

☐ Non-Standardized Money Purchase - **POST**

☐ Non-Standardized Target Benefit - **POST** * Not offered starting with Cycle 4

☐ Standardized 401(k) (Adoption Agreement Format) - **POST**

Defined Benefit:

n/a

Section 403(b):

n/a

Non qualified plans:

n/a

Other:

☐ Misc (1099, 5500 or Compliance)

Select a plan to pull default values from:

Default:

Convert Plan

Cancel and Return to Plan

All checklist questions will be copied to the selected checklist (where possible). You will be provided a list of incompatible checklist questions if there are any. After completing the conversion, it is recommended that you review the checklist, run the edit checks and update where applicable.