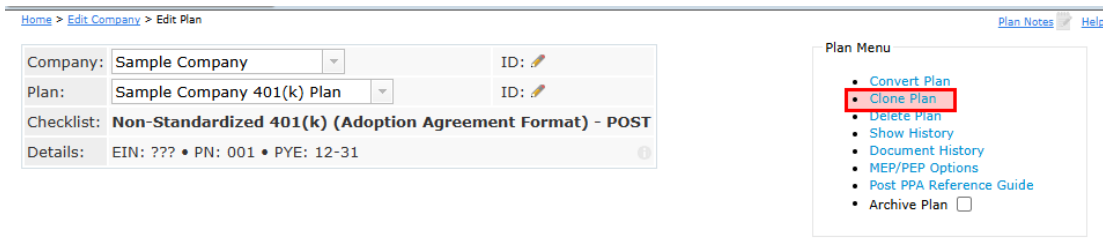


Clone Plan

12/05/2025 9:52 am CST

The Clone Plan feature can be used when you would like to add a plan to a company that is identical or similar to an already existing plan on your account. Cloning a plan will copy the checklist type and all checklist answers of the original checklist to a company that you designate.

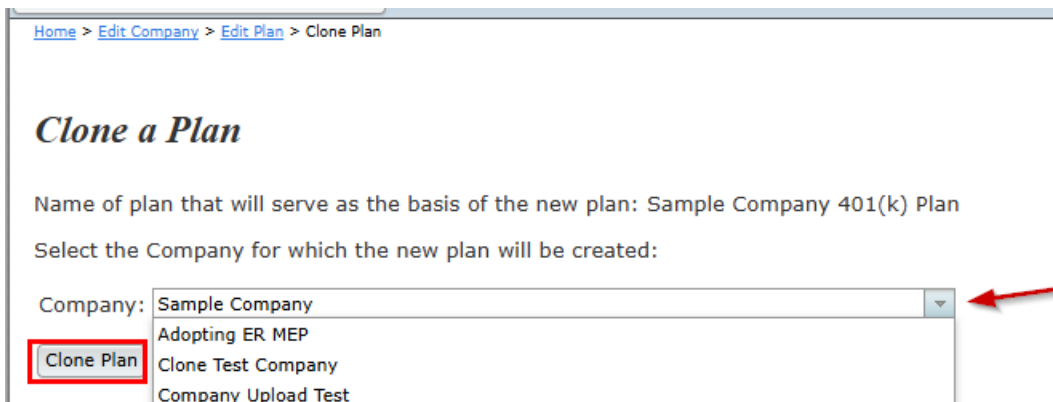
1. If the plan is to be added to a new company that is not on your account, you will first need to add the company to your account.
2. Go to the Edit Plan page of the plan that you want to clone from.
3. Click on the "Clone Plan" link located under the Plan Menu.



The screenshot shows the 'Edit Plan' page. On the left, there are fields for 'Company' (Sample Company), 'Plan' (Sample Company 401(k) Plan), 'Checklist' (Non-Standardized 401(k) (Adoption Agreement Format) - POST), and 'Details' (EIN: ??? • PN: 001 • PYE: 12-31). On the right, the 'Plan Menu' is displayed with options: Convert Plan, Clone Plan (highlighted with a red box), Delete Plan, Show History, Document History, MEP/PEP Options, Post PPA Reference Guide, and Archive Plan.

4. From the drop down next to "Company", select the company that you wish to clone the plan to. Click on the "Clone Plan" button.

Please note: the list will default to the company associated with the plan that is being cloned. Be sure to select from the list the new company that you want to clone the plan to.



The screenshot shows the 'Clone a Plan' page. It displays the 'Name of plan that will serve as the basis of the new plan: Sample Company 401(k) Plan'. Below this, it says 'Select the Company for which the new plan will be created:'. The 'Company' dropdown menu is open, showing options: Sample Company, Adopting ER MEP, Clone Plan (highlighted with a red box), Clone Test Company, and Company Upload Test. A red arrow points to the 'Clone Plan' option.

The plan you just added will have the cloned plan's name preceded by "Created from". You can re-name the plan name as applicable in Section A. 2a.b, It is recommended to review the Edit Plan checklist to verify the plan's provisions and make any necessary adjustments.

▼ A. GENERAL INFORMATION

Edit Ch

▼ A. General

1. Plan Number



001

2a. First line of Plan name



Created from Sample Company 401(k) Plan

2b. Second line of Plan name

