How to Submit Your Plan Contributions

It's as easy as 1-2-3! Enroll your employees, send us your contribution listing and arrange for payment!

STEP 1: ENROLL NEW EMPLOYEES

- Enroll new employees before submitting their first contribution. (This establishes the account so the participant can make their investment election.)

  To add a new employee online:

  1. Log in to your plan sponsor account online.
  2. Click on the "Transactions" tab at the top of the page.
  3. Where it says "Add/Update EE" type the SS# in the box and click "New Employee."
  4. Enter the employee's information in the fields provided.
     (We must have their address, date of birth and date of hire in order to set up their account).
  5. Click "Set Default" for both VRU access and Web access.
  6. Click "Submit."

- Paper enrollment forms are no longer required!
- If you have more than just a few employees to enroll, please contact us and we can provide you instructions on submitting them electronically.
- Ask new employees to complete their enrollment by going online and choosing investment elections (if applicable)

STEP 2: PREPARE AND SUBMIT CONTRIBUTION LISTING

- Your contribution listing should contain the following information:
  - Submit only one listing per payroll period (consolidate job sites please)
  - Header: Employer name, Group number, paycheck date covered by listing, check number (if applicable) and total payment amount
  - Participant Last Name
  - Participant First Name
  - Complete Social Security Number
  - Contribution Amount broken down by source
    (clearly label columns prevailing wage, deferral, match, profit sharing, etc.)

- Address (including city, state and zip code in separate fields)
- Date of Birth, Date of Hire and Date of Termination (if applicable)
- Optional: Phone number and Email address
- Should include totals for each source/column

- If listing contains 5 participants or less, simply mail us a hard copy. *PLEASE DO NOT SUBMIT ELECTRONICALLY.*
- If listing contains more than 5 participants, please submit electronically. *PLEASE DO NOT MAIL HARD COPY.*
- Contact PBS if you would like a personalized contribution template.

To submit a contribution listing electronically:

Electronic contribution summary spreadsheets should be uploaded to The Contractors Plan through the website www.contractorsplan.com. Please do NOT email contribution listing.

In general, files should be in Excel or a similar format. The file name should contain the last paycheck date covered by the contribution.

1. Log in to your plan sponsor account online.
2. Once logged in, click on the "Tools" tab located at the top of the page.
3. When the next window appears, click on "Upload File" in the left margin.
4. On the Upload File window, click on "Browse," select your spreadsheet file and click "Open."
5. In the file description, please include the following information:
   a. Group number and name
   b. Contribution period
   c. Contribution transmittal method – wire, ACH, check
   (if sending a check, please include the check number)
6. Click "Upload" to complete the process.

STEP 3: SUBMIT PAYMENT FOR THE CONTRIBUTION

Payment can be sent in one of the following ways:

1. **By Check** Please make check payable to The Contractors Retirement Plan and write your Group Number on your check. Send both regular mail and overnights to:

   The Contractors Plan
   c/o Plan Benefit Services
   11910 Volente Road
   Austin, Texas 78726

2. **By Wire or ACH** Please contact us for the wiring instructions.
3. **By Draft** Plan Benefit Services can draft your account for the amount on the contribution listing. Please contact us if you would like to set this up.

NEED HELP?

Please contact Retirement Employer Services by sending an email to contractors@contractorsplan.com or by calling (866) 457-8812. We would be happy to assist.