



RETIREMENT PLAN  
SERVICES

# Welcome to John Hancock

Let us help kick-start your transition to John Hancock by pre-filling the contract paperwork with key details about your plan. Simply fill out the form below and we'll make sure your contract reflects the details you've provided.

## COMPANY INFORMATION

Company Name:

Business Address:

City:

State:

Zip:

Type of Business (Corporation, Partnership, etc.):

**KEY PEOPLE** Note: Plans must have at least one trustee. Authorized signers and administrative contacts are not required. Additional space for key people on the reverse side of form.

### Trustee

Name:

Phone:

Email:

### Additional Trustee

Name:

Phone:

Email:

### Authorized Signer

Name:

Phone:

Email:

### Administrative Contact

Name:

Phone:

Email:

### Primary Contact (for plan set-up only)

Name:

## CONTRACT DETAILS

Contract fees  Option 1: Deduct from participant accounts  Option 2: Bill to the plan sponsor

Note: Most plans elect to have all administration fees for the plan deducted from participant accounts (assets in the plan). However, you can also choose to have the employer billed directly for a portion of the plan costs.

Safe Harbor? YES  NO

Do you want to use the proposed fund line up? YES  NO

**John Hancock** – we're easy to do business with and we make plans work!

## ADDITIONAL KEY PEOPLE

### Trustee

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Trustee

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Authorized Signer

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Authorized Signer

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Administrative Contact

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Administrative Contact

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Payroll Administrator

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Payroll Administrator

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

## GLOSSARY

**Trustee:** The primary party responsible for the plan with ultimate authority to make plan-level decisions and approve financial transactions.

**Authorized Signer:** Someone other than the trustee with access to the plan who is authorized to approve financial transactions (such as participant loans).

**Administrative Contact:** Someone other than trustee and authorized signer that will be doing the day-to-day payroll & administration of the plan. He/she will have access to the plan-level website but cannot approve financial transactions.

**Payroll Administrator:** Someone other than the trustee, authorized signer or administrative contact who has limited web access. He/she will only be able to submit payroll information and access payments online.

**Primary Contact for Plan Set-Up:** The main contact person for plan set-up. This can be a trustee, authorized signer or administrative contact.



John Hancock Life Insurance Company (U.S.A.) and John Hancock Life Insurance Company of New York are collectively referred to as "John Hancock".

Both John Hancock Life Insurance Company (U.S.A.) and John Hancock Life Insurance Company of New York do business under certain instances using the John Hancock Retirement Plan Services name. Group annuity contracts and recordkeeping agreements are issued by: John Hancock Life Insurance Company (U.S.A.), Boston, MA 02210 (not licensed in New York) and John Hancock Life Insurance Company of New York, Valhalla, NY 10595. Product features and availability may differ by state. The Investment Management Services Division of John Hancock provides investment information relating to the group annuity contract. Plan administrative services may be provided by John Hancock Retirement Plan Services LLC or a plan consultant selected by the Plan.

NOT FDIC INSURED | MAY LOSE VALUE | NOT BANK GUARANTEED | NOT INSURED BY ANY GOVERNMENT AGENCY

© 2015 All rights reserved.

GT-PS 25586-GE 02/15-25586

FOR PLAN SPONSOR USE ONLY. NOT FOR USE WITH PLAN PARTICIPANTS.

GA020415217011