



# SAVE TOGETHER

THE ALLIANCE 403(B) RETIREMENT PLAN

## NEW EMPLOYER CHECKLIST



This checklist is for employers who wish to enroll their employees in the Alliance Retirement Plan. Click on each form to access it or visit [alliancebenefits.org/forms](https://alliancebenefits.org/forms).

### FORMS TO COMPLETE

- [Employer Retirement Plan Adoption Agreement](#)
- [Employer Bank Authorization](#)
- [Employer Monthly Contribution Report](#)
- [Participant Enrollment](#) (one per employee)

### PAPER FORMS

Any paper forms should be uploaded and submitted directly to Alliance Benefits.

-  Upload your paper forms by clicking [here](#).
-  Questions? Please call (800) 700-2651 or email [retirement@cmalliance.org](mailto:retirement@cmalliance.org).



ALLIANCE  
BENEFITS  
Compassion, Integrity, Respect.