

RETIREMENT SAVINGS CONTRIBUTION STATEMENT

Contribution Reporting Return Template

Employer Name:

Plan Name:

Plan ID / Number:

Reporting Period:

Submission Date:

Batch Reference:

PARTICIPANT INFORMATION

Participant Name:

Account / SSN (Last 4):

Date of Birth:

Date of Hire:

CONTRIBUTION DETAILS

CONTRIBUTION TYPE	CURRENT PERIOD AMOUNT	YEAR-TO-DATE (YTD) AMOUNT
Employee Pre-Tax (401k / Traditional)		
Employee Post-Tax (Roth)		
Employer Matching Contribution		
Employer Non-Elective / Profit Sharing		
Employee Catch-Up Contribution		
Other / Voluntary Contributions		
Total Contributions		

DECLARATION & AUTHORIZATION

I hereby certify that the information provided on this Retirement Savings Contribution Statement is accurate, complete, and in compliance with the governing plan documents and applicable regulatory requirements.

Authorized Employer Representative Signature

Date:

Participant Signature (if required)

Date: