



## Sample Implementation Schedule for Existing Plan

Action Item	OverDue	Owner	Due	Complete	Notes
New Account Paperwork		BPAS	1/1		Completed PPF, Attachment A, SFP
Authorization Letter		Plan Sponsor	1/4		
Funds Approved		BPAS	1/9		
Internal BPAS PHM		BPAS	1/10		
Contact Prior Providers		BPAS	1/10		
Blackout Notice to Client		BPAS	1/17		
EBN Link (kits ordered if applicable)		BPAS	1/22		
CensusPro Training		BPAS	1/24		
Blackout Notices Distributed		Plan Sponsor	1/25		
Enrollment Kits Arrive		BPAS	2/5		Earliest date to schedule education meetings
Plan Document and ASA Sent		BPAS	2/12		
Final Deposit to Prior Provider		Plan Sponsor	2/28		
Blackout Period Begins		Prior Provider	2/25		
Plan Document and ASA Returned		Plan Sponsor	3/1		
Assets are Liquidated		Prior Provider	3/5		
Assets are Wire Transferred to BPAS		Prior Provider	3/5		
Assets Reinvested		BPAS	3/6		
First Contribution to BPAS		Plan Sponsor	3/6		
Conversion Data Received		Prior Provider	3/7		
Web Demo		BPAS	3/15		
Blackout Period Ends		BPAS	3/29		PIN letters sent to participants
BPAS Issues First Statement		BPAS	3/31		
BPAS Does First 5500 Filing for PYE		BPAS	3/31		