

Notices

Notices gives important documents a central home. This includes compliance and regulatory documents that are added to the appropriate account and plan as they become available.

You'll see the notices connected to the accounts and plans you're authorized to access. That means you have a dependable place to look for these documents instead of relying only on your inbox or trying to remember which message contained an attachment.



[Dashboard](#)[My Accounts](#)[Invoices](#)[Sentinel Team](#)[Notices](#)[Tasks](#)

AA

Notices

View annual compliance documents and regulatory notices.

Q Search by Document, Plan Name...

X

Year

Account

Year	Documents	Plan	Published Date
2025	Annual Participant Notice Package Confirmation that the required package of annual participant notices (e.g., fee, safe harbor QDIA) has been prepared for distribution.	Pension Plan	11/01/2025
2025	408(b)(2) Fee Disclosure for Plan Administrators (SPA) Outlines the advisory services provided to your plan, the provider's fiduciary status, and expected direct and indirect compensation, as required under ERISA 408(b)(2).	Cash Balance Plan	08/01/2025
2025	408(b)(2) Fee Disclosure for Plan Administrators (SPA) Outlines the advisory services provided to your plan, the provider's fiduciary status, and expected direct and indirect compensation, as required under ERISA 408(b)(2).	Pension Plan	08/01/2025
2025	408(b)(2) Fee Disclosure for Plan Administrators (SBG) Outlines the administration and/or recordkeeping services provided to your plan, the provider's fiduciary status, and expected direct and indirect compensation, as required under ERISA 408(b)(2).	Pension Plan	08/01/2025
2025	408(b)(2) Fee Disclosure for Plan Administrators (SBG) Outlines the administration and/or recordkeeping services provided to your plan, the provider's fiduciary status, and expected direct and indirect compensation, as required under ERISA 408(b)(2).	Cash Balance Plan	08/01/2025
2024	Annual Participant Notice Package Confirmation that the required package of annual participant notices (e.g., fee, safe harbor QDIA) has been prepared for distribution.	Pension Plan	11/01/2024