

Summary of material modifications creation process

Welcome to the myHRcounsel summary of material modifications (“SMM”) creation process. Through this process, we will provide you with an ERISA compliant SMM for your company.

In order to provide you with a complete SMM, we ask that you fill out the following questionnaire. It will provide us with guidance in order to ensure the SMM is fully legally compliant.

When the questionnaire is completed, save the document and return the electronic version. Upon receipt of the completed questionnaire, we will produce a draft copy for your review.

Once you have reviewed the draft, you can send us your comments or questions, if you have any. The draft and review process will continue until we have a final document. At that time, we will send you the final version of the SMM in electronic format.

## Plan Information

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| Full legal name of the company: (e.g. Acme Products, Inc.) | Click here to enter text. |
| Name of plan: (e.g. Acme Corp Health and Welfare Plan) | Click here to enter text. |
| Type of plan: | Click here to enter text. |
| Effective date of modifications: | Click here to enter text. |
| What are the modifications made to the plan? (feel free to attach separate sheet) | Click here to enter text. |
| Contact info for plan administrator: | Click here to enter text. |