



**Eder Financial**

BOLD. BALANCED. TRUSTED.

# Enrollment process for newly eligible employees

Employers with recurring ACH pulls

## **Employee is hired**

- Employer sets up new employee on their payroll
- Employer adds new employee to PIM portal (even if the employee is not yet eligible)
- The Eder Retirement Plan team loads data from PIM and sets up web access

## **Employee is eligible**

- Employer distributes welcome kit with the Eder Retirement Plan Handbook, welcome flyer, and other materials
- Flyer includes website registration instructions directing them to change their investment elections and designate a beneficiary on the Eder Retirement Plan site
- Employer adds contributions to PIM

## **Eder Retirement Plan system updated**

- The Eder Retirement Plan team calculates contribution rates from PIM data and loads to system