

Amendment – Plan Design Services (Settlor Services)



Amendment Effective Date: _____

Name of Plan		
Name of New Recordkeeper/Platform Provider (if app)	Plan ID No.	Employer Tax ID
DBA Name	Advisor Representative(s)	

This Amendment relates to the agreement dated _____ by and between Global Retirement Partners, LLC (“Advisor”) and _____ (“Client”) (“Agreement”), and hereby amends the Agreement and, if applicable, any previous amendments to the Agreement as set forth herein. Advisor and Client shall be individually referred to as a “Party” or collectively, as the “Parties.” The Plan Design Services described below are in addition to the Services described in the Agreement and are subject to the terms and conditions of the Agreement. This Amendment shall be effective as of the Effective Date upon an authorized designated employee of Advisor signing the Agreement. Capitalized terms not defined herein shall have the meanings given to them in the Agreement.

NOW THEREFORE, in consideration of the foregoing and for other good and valuable consideration, the receipt and adequacy of which are hereby acknowledged, the Parties hereby agree as follows:

1. **Settlor Services.** Advisor will consult with Client about amending an existing Plan, terminating an existing Plan, or creating a new Plan, as Client may reasonably request and in advance of the change. Services may include Advisor conducting a plan design study and cost projections; reviewing corporate structure and employee demographics and objectives; evaluating and preparing for plan mergers; and making recommendations on the design of the Plan. Specific design services, if applicable, are as follows:

Specific design services not outlined above

2. Client agrees to pay Advisor the following fees for the plan design services (the “Plan Design Fees”). **Client hereby agrees that the Plan Design Fees shall be billed directly to Client and will not be charged against or deducted from Plan assets.**

Flat Fee: _____ annually, paid quarterly in arrears

Hourly Rate: _____ / hour

Flat Fee: _____ annually, paid in arrears

Project Fee: _____

3. Except as amended by this Amendment, all other terms and conditions of the Agreement shall remain in full force and effect, without modification or waiver.

4. Client represents that the individual signing on behalf of the Client has been duly appointed by corporate action to sign this Amendment on behalf of the Client, and no other signatories are required.

5. This Amendment will be governed and construed in accordance with the laws as set forth in the Agreement.

Signature page follows

IN WITNESS WHEREOF, the Parties have caused this Amendment to be signed and delivered by their duly authorized officers, all effective as of the Amendment Effective Date.

GLOBAL RETIREMENT PARTNERS, LLC

By: _____

Name: _____

Title: _____

Date: _____

CLIENT

By: _____

Name: _____

Title: _____

Date: _____

CLIENT

By: _____

Name: _____

Title: _____

Date: _____

ADVISOR REPRESENTATIVE ACKNOWLEDGEMENT

By signing below, the below named Advisor Representative confirms the Services to be provided under this Amendment. Advisor Representative only confirms the Services and is not considered a party to this Amendment or the Agreement.

By: _____

Name: _____

Date: _____