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### Third Party Administrative Team

**Sandra Wehner**, [sandy@omegagpa.com](mailto:sandy@omegagpa.com), Vice President of Omega, Inc., can answer any and all questions concerning your Plan and the administration of the Plan Document. It is greatly appreciated that questions concerning the specific issues be directed to the administrator listed below

**Helen Joseph**, [Helen@omegagpa.com](mailto:Helen@omegagpa.com) prepares quarterly billings. In most cases Omega, Inc., bills all 401(k) Plans on a quarterly basis. Invoices are mailed on January 1, March 1, June 1, and September 1. We bill in arrears, meaning the invoice you receive dated January 1 will be for the final quarter of the previous year, the one mailed on March 1<sup>st</sup> will be for the first quarter of the current year and so on. Questions concerning invoices should be directed to Helen.

**Pat Lutz**, [pat@omegagpa.com](mailto:pat@omegagpa.com), can assist you with most Plan questions and will process all Participant terminations and distributions according to your Plan Document. In the event an employee terminates employment, please complete a copy of the enclosed Distribution Request form (A file of this Word document can be obtained by contacting [pat@omegagpa.com](mailto:pat@omegagpa.com)) and fax to our office. We will contact the participant directly to complete the required withdrawal paperwork and forward to you for Trustee signature. You may also provide this information to our office by e-mailing Pat at [pat@omegagpa.com](mailto:pat@omegagpa.com).

**Mary Ann Cantello**, [maryann@omegagpa.com](mailto:maryann@omegagpa.com), can assist you with most Plan questions and will process employee loans if your Plan Document contains a loan provision. Please use the enclosed Loan Letter template (A file of this Word document can be obtained by contacting [maryann@omegagpa.com](mailto:maryann@omegagpa.com)) copy on to your letterhead, complete the information requested, have a Trustee sign. Fax to our office and Mary Ann will prepare the required loan paperwork for you.

**Louise Clark**, [louise@omegagpa.com](mailto:louise@omegagpa.com) can assist you with any Plan questions and your employee census. We will be requesting an annual census of all employees. A semi-annual census will be requested if your Plan is not Safe Harbor. This is required to keep your Plan in compliance. We will mail or e-mail at the request of the Trustee, the Anniversary Notification (Census) for you to add new employees, dates of termination, birth and hire; compensation, salary deferrals, etc. Feel free to use an Excel spreadsheet to report the requested information to us. Please be sure the company name is on all reports. Any questions concerning the census can be addressed to Louise Clark, [louise@omegagpa.com](mailto:louise@omegagpa.com)