Mailing to Plan Trustees for Solo(k)s with updated IRS Opinion Letter and PPA Base Plan Document

During the week of September 9, we will mail an updated IRS Opinion Letter and PPA Base Plan Document to Plan Trustees for Solo 401(k)s serviced at E*TRADE Advisor Services.

As you know, Trust Company of America was acquired by E*TRADE Savings Bank on April 9, 2018, and is now operating as E*TRADE Advisor Services. As a result of the acquisition, the prototype plan document approved by the Internal Revenue Service has been updated to reflect E*TRADE Savings Bank as the provider.

Please view a **sample of the letter** and the **PPA Base Plan Document** being mailed to the Plan Trustees for Solo 401(k)s provided in a separate attachment to this feature.

Please contact your relationship manager with any questions.