

401(k) Easy™ Consultant's Log

Consultants: Please use a separate Log for each 401(k) Easy™ customer.

Date	Employee Spoken With	At what time?	Length of Consult (in minutes)

Brief Synopsis of Consultation (problem and solution):

Date	Employee Spoken With	At what time?	Length of Consult (in minutes)

Brief Synopsis of Consultation (problem and solution):

X

Consultant signature

consultant name:

client name (company):

job I.D. number:

job type (check one):

Setup Consultation Tech Consultation

job completed? (check one):

Problem resolved
 Consultation ongoing



401(k) Easy™

run-it-yourself 401(k) plans