

Bridge Cedarcrest Advisory · New Hire Benefits Checklist

Fast, fiduciary guidance for new hires and relocations.

Account Inventory

- List every prior-employer retirement account and current custodian.
- Confirm beneficiary designations are up to date.
- Collect most recent statements for rollover planning.

Benefit Elections

- Review health plan options and note enrollment deadlines.
- Set initial 401(k)/403(b) contribution rates aligned to your goals.
- Enroll in HSA/FSA programs where applicable.

Compliance Tasks

- Upload required identification documents to HR portal.
- Complete mandatory training modules for your department.
- Schedule the onboarding review session at <https://calendly.com/bpettee/benefits-meeting>.

Important Dates

Task	Owner	Deadline	Notes
Submit benefit elections	You	Within 30 days	
Book onboarding review	You	Before first paycheck	
Confirm rollover strategy	Bridge Cedarcrest Advisory	Within 45 days	

Personal Notes