Cascade Advisory · New Hire Benefits Checklist

Handle legacy accounts before day one.

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	Cascade Advisory	Within 45 days	

Personal Notes