



Retirement Plan Document System (RDS)

For Prototype, Volume Submitter, and IDP Documents

At your fingertips - everything needed to produce accurate, dependable and affordable documents

Take control and save money by generating retirement plan documents with DATAIR's PC-based *Retirement Plan Document* System. **RDS** lets you tailor the substance, text and appearance of your clients' plan documents... *without per-document preparation charges!*



RDS OFFERS MORE CHOICES

Choose your plan types

- ◆ 401(k)
- ◆ Profit Sharing
- ◆ Money Purchase
- ◆ Target Benefit
- ◆ 403(b)
- ◆ Defined Benefit
- ◆ Cash Balance Pension

Choose your Document types

- ◆ Standardized & Nonstandardized Prototypes (Long Form Adoption Agreements)
- ◆ Short Form Prototypes
- ◆ Volume Submitters (Prototype Format)
- ◆ Volume Submitter Plans (Individually Designed Plan (IDP) Format)

Choose your Document Sponsor

Re-register our documents in your company's name or let DATAIR be your document sponsor.

A Complete Package

RDS fees include training, technical support and all updates including future amendments and restatements.

RDS includes Summary Plan Descriptions (SPDs), amendments, customizable employee forms and notices, board resolutions and government filing forms.





Retirement Plan Document System (RDS)

ONE COMPREHENSIVE SYSTEM

RDS generates all of the following as needed:

- ◆ Plan design checklist
- ◆ Plan/trust documents & Board Resolutions
- ◆ Adoption Agreements
- ◆ Summary Plan Descriptions
- ◆ Procedures: loans, QDRO
- ◆ 5307, 5300, 8717 and Schedule Q filing forms
- ◆ Ancillary forms
- ◆ Amendments to maintain Plan Qualification

MAXIMUM FLEXIBILITY

- ◆ Ability to insert customized Plan and SPD language.
- ◆ Built-in document generator gives you total control of document appearance: proportional fonts, different sizes and styles of fonts *without a word processor*.
- ◆ Design preference screens to customize employee notices, applications, designations, etc.
- ◆ Export to any word processor for further customization.
- ◆ Option to apply to IRS to become a Document Sponsor by re-registering our documents in your company's name.

INCLUDED PROVISIONS

- ◆ Safe Harbor plans
- ◆ Automatic Enrollment
- ◆ Gateway cross-tested
- ◆ 412(e) DB plans
- ◆ Class or per-participant allocations and accruals

Affordable pricing
Helpful training
Reliable support



1967 - 2013

OTHER FEATURES

- ◆ Shares unified database with DATAIR's Pension Reporter system.
- ◆ Speed data entry with plan templates.
- ◆ Full expert document and software support.
- ◆ Select only the plan types that meet your needs, or get "The Works" and save!
- ◆ Volume discounts and favorable financing terms are available.

NEW! FORMATS AND FEATURES

- ◆ Short Form Prototypes
— Perfect for small plans!
- ◆ Prototype Format Volume Submitters
— Flexible design in an easier-to-use format.
- ◆ Cash Balance Pension Plans
— GUST plus EGTRRA Cycles A-E
- ◆ 403(b) Plans
— IRS model, ERISA and Non-ERISA

Ask about our Cafeteria Plan Documents

SYSTEM REQUIREMENTS

- ◆ Minimum Recommended Hardware
 - ✓ Pentium® 2.4 GHz processor
 - ✓ 2 GB RAM
 - ✓ 1 GB free disk space
 - ✓ CD-ROM drive
 - ✓ 1024 x 768 (XGA resolution) video
 - ✓ Printer: 300 to 1200 dots per inch resolution (laser quality)
- ◆ Operating Systems
 - ✓ Windows 2003, XP, Vista, Windows 7, 8
 - ✓ Windows-supported networks
- ◆ Internet Explorer 7 or later

For additional information including a demo and sample documents, visit www.datair.com or contact your DATAIR sales representative.



DATAAIR
EMPLOYEE BENEFIT SYSTEMS, INC.

735 N. Cass Avenue • Westmont, IL 60559-1100
(888) 328-2474 • Fax (630) 325-2660
www.datair.com • sales@datair.com