

## **DATAIR Announces 1099-R Service Bureau**

January is a hectic month for plan service providers, and 1099-R's play a major role. Would having an outside firm print, mail, and electronically file your 1099-R's relieve you of some of that burden? If so, the DATAIR 1099-R Service Bureau is the answer!

Let DATAIR free you from ordering and stocking special paper and envelopes; printing, folding and stuffing envelopes; and sealing, stamping, and mailing the forms. And, you can skip having to manually transmit the files to the IRS and verifying the filing status, and printing the red IRS copy of the forms too.

### ***How does it work?***

Just enter your 1099-R data in DATAIR's Pension Reporter as you normally do. Then, with a press of a button, send the data off to DATAIR for processing.

Once received, DATAIR will...

- print and mail recipient copies of the forms;
- electronically file them with the IRS;
- electronically file with states that participate in the combined state/federal filing program;
- prepare and email State Copy 1 in PDF format to you for states not participating in combined state/federal filing;
- prepare and email Payer Copy D in PDF format to you; and
- notify you of the status of your filings each step of the way.

.... all at a price that's likely lower than doing it yourself!

### ***What's the Cost?***

The normal price will be \$1.50 per form, but we are offering a special introductory price this year of \$1.25 per form for those that return the attached pre-registration form no later than November 10, 2006 indicating that you plan on using our Service Bureau for your 2006 1099-R's. The \$1.25/\$1.50 rate applies to forms mailed to payees with a US mailing address.

### ***Sounds like the solution I've been looking for! How do I get started?***

We ask that those contemplating using the service complete the attached pre-registration form which will help us gauge the number of 1099's that will be processed for 2006. Pre-registering will not commit you to using the service.

### ***I'm not completely sold yet. Where can I get more information?***

The attached Service Bureau Q&A may answer your questions. If not, please contact your sales representative at (888) 328-2474 or sales@datair.com.

## DATAIR 1099-R Service Bureau Q&A

### *What's the deadline for submitting my data to the Service Bureau?*

For 2006 forms, data must be received no later than 5 pm CST Saturday, January 27, 2007 in order for us to meet the January 31<sup>st</sup> recipient copy mailing deadline. Forms submitted after that will be processed on a best-effort basis, however, no guarantee can be made that they will be mailed by the January 31<sup>st</sup> deadline. To receive the discounted rate, forms must be received by January 27, 2007.

### *Do I need to file all my 1099's at once?*

No. You may send them to the Service Bureau in batches as you have them ready.

### *How does the service work?*

You will securely transmit your 1099-R data to DATAIR using the Electronic filing wizard in Pension Reporter. You'll then be taken to a web page to pay for the filing via credit card. Once payment is received, we will begin processing your filing.

### *What will the Payee receive?*

The recipient will receive a pressure sealed 1099-R form with Copies A, B, and 2 and the IRS Recipient Instructions that meet all IRS requirements. Optionally, you may choose to include contact information should they have any questions about their 1099-R.

### *What happens if their forms are returned as undeliverable by the Post Office?*

You have the option of specifying the Payer or the TPA name/address as the return address for the mailed forms. The specified party is then responsible for obtaining a corrected address and delivering the form.

### *What happens if a payee doesn't receive or loses their 1099?*

You may log into our web site to request that we resend the form for an additional charge of \$1.00 per form. Alternately, you may print the form locally from PR and provide it to the participant yourself.

No data changes are permitted for a re-send. If data changes are required, a corrected form should be prepared.

### *What happens if incorrect information is sent to DATAIR?*

Once transmitted to DATAIR, the forms should be considered "filed". Thus, any changes should be submitted as a corrected form. An additional per-form fee is charged for corrected forms.

### *We don't currently use Pension Reporter; can I still use the Service Bureau?*

The Pension Reporter 1099-R module is required to prepare your filings. If you do not currently license the Pension Reporter 1099-R module, please contact your sales representative for special pricing.

If you currently use DATAIR's Pension System to prepare 1099's, you can easily transfer the data to Pension Reporter to take advantage of the Service Bureau.

***Will you file the 945 also?***

The 945 requires the plan sponsor's signature; therefore we can not file it for you. However, it can be quickly and easily be printed from Pension Reporter using the 1099-R data entered.

***Can I still use the Service Bureau if I don't pre-register?***

We expect to order sufficient extra supplies to be able to process all 1099's submitted to us. However, pre-registering assures you that supplies are set aside for you. Due to the lead time required to obtain the supplies, we urge you to submit your 1099 forms as early as possible to assure we are able to accommodate you. If you expect to have in excess of 1,000 forms, and did not pre-register, please contact DATAIR for assistance.



*Serving Pension & Benefits Professionals since 1967*

## DATAIR 1099-R Service Bureau Pre-Registration Form

Pre-registering does not commit you to use the service. We are solely seeking to determine the overall level of interest in this service for the 2006 form year so that we may pre-order sufficient quantities of supplies.

We will reserve for you the number of forms indicated below. Although we expect to have additional supplies on hand, we can not guarantee forms will be available for those who fail to pre-register. Pre-registering also assures you will receive the discounted \$1.25/form rate\*.

Yes, I'm interested in using the DATAIR 1099 Service Bureau for 2006!

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, ST ZIP \_\_\_\_\_

Email \_\_\_\_\_

Client # \_\_\_\_\_

Approximate number of 1099-R forms you anticipate submitting to the service bureau: \_\_\_\_\_

Approximate number of plans you prepare 1099-R's for: \_\_\_\_\_

Comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\* \$1.25/\$1.50 rate applies to 1099-R's to be mailed to US addresses only

**Please return this form to DATAIR by November 30, 2006  
via fax to (630) 325-2660, or via email to support@datair.com**