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*Serving Pension & Benefits Professionals since 1967*

## **PRESS RELEASE**

### ***Cash Balance Pension Plan Documents from DATAIR – Software updated for Cycle D EGTRRA***

For immediate release

September 30, 2009

Westmont, IL. - DATAIR Employee Benefit Systems, Inc. announces the addition of the EGTRRA Cycle D Cash Balance Pension Plan Document to its Plan Document System (DS). Cash Balance plans are Defined Benefit Plans with the higher deductibility limits available to DB plans plus the employee communication advantages of DC account balance plans.

DS is a highly automated system; it lets users select plan provisions from design checklists and then it generates completed plan documents, SPDs, administrative forms, notices and procedures tailored to the needs of each sponsor.

Cash Balance Plans are Individually Designed Documents, and should be filed with Form 5300 according to the staggered five year EGTRRA Cycle required for each Plan Sponsor. An employer that does not file for an individual determination letter will have no assurance that the plan meets the latest requirements of qualification. While, much of the language in DATAIR's Cash Balance plan is based upon DATAIR's IRS-approved Defined Benefit Volume Submitter Document so application for an individual Determination Letter may be facilitated, it is no substitute for an individual determination letter.

DS lets users choose various Cash Balance Plan Options including pay credit accrual periods; pay credit allocation formulas; interest accrual periods and fixed or variable interest rates. It contains all language required for compliance with Cash Balance Safe Harbor Treasury Regulations §1.401(a)(4)-8(c)(3).

DATAIR lets pension professionals license DS with just the document types and plan types they need with license and support fees based on the modules chosen: Prototype/Volume Submitter/Individually Designed – DC/401(k), Defined Benefit, 403(b), Cafeteria, and Cash Balance. DS is licensed on a site basis (no limit to the numbers of users or documents produced at one office). Licensees receive training and expert support on systems and design issues at no additional cost.

DATAIR, founded in 1967, is a leading provider of software and support services for benefits and pension professionals. Additional information concerning DS and other DATAIR software is available at [www.datair.com](http://www.datair.com) or by calling (888) 328-2474.

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