



**DATAIR**

EMPLOYEE BENEFIT SYSTEMS, INC.

*Serving Pension & Benefits Professionals since 1967*

**2011 TRAINING CLASSES in WESTMONT, IL**  
**SPACE IS LIMITED –sign up today!**

SYSTEM	AUG	DEC	FEE	DAY	TIME
DC/Win	1-2	5-6	\$500	Monday & Tuesday	8-4:30 (CST)
DC Documents	3	7	\$300	Wednesday	8-4:30 (CST)
DB/Win	8-9	12-13	\$500	Monday & Tuesday	8-4:30 (CST)
DB Documents	10	14	\$300	Wednesday	8-4:30 (CST)

\_\_\_\_\_  
Company Name

(\_\_\_\_\_) \_\_\_\_\_  
Contact Phone

\_\_\_\_\_  
DATAIR Acct. No.

\_\_\_\_\_  
Contact Name

\_\_\_\_\_  
Contact Email

I would like to attend the following session(s) for the month of: \_\_\_\_\_

\$500      \$300      \$500      \$300

\_\_\_\_\_  DC/Win  DC Docs  DB/Win  DB Docs \$ \_\_\_\_\_

\_\_\_\_\_  DC/Win  DC Docs  DB/Win  DB Docs \$ \_\_\_\_\_

\_\_\_\_\_  DC/Win  DC Docs  DB/Win  DB Docs \$ \_\_\_\_\_

\_\_\_\_\_  DC/Win  DC Docs  DB/Win  DB Docs \$ \_\_\_\_\_

Print Attendee name(s) above

TOTAL \$ \_\_\_\_\_

Method of Payment: **(Payment is required with registration and cannot be charged to account)**

\_\_\_\_\_ Check enclosed made payable to **DATAIR Employee Benefit Systems, Inc.**

\_\_\_\_\_ Credit Card - Please charge my: \_\_\_\_\_ AMEX \_\_\_\_\_ VISA \_\_\_\_\_ MasterCard

Cardholder's Name: \_\_\_\_\_ Credit Card #: \_\_\_\_\_

CVV/CVC (3 digits on the back of a Visa or MasterCard or 4 digits on the front of an American Express card): \_\_\_\_\_

Credit Card Billing Address: \_\_\_\_\_

Signature: \_\_\_\_\_ Exp Date: \_\_\_\_\_

**NOTE: Please do not make flight or hotel reservations until you receive confirmation. Registration Forms received less than 2 weeks prior to training are subject to class availability.**

**Cancellation Policy:** A full refund will be issued for cancellations received more than 5 business days prior to class; cancellations received less than 5 business days will be charged the full registration fee.

Please return this Registration Form to: **DATAIR Employee Benefit Systems, Inc., Attn: Training Department**  
735 North Cass Avenue, Westmont, IL 60559-1100  
(630) 325-2600 | Fax: (630) 325-2660 | <http://www.datair.com> | E-mail: [info@datair.com](mailto:info@datair.com)

# EDUCATIONAL CLASSES

## **DEFINED CONTRIBUTION AND DEFINED BENEFIT VALUATION SYSTEM**

*2 day, Monday-Tuesday, 8:00 A.M.-4:30 P.M (CST)*

DC/Win and DB/Win sessions will cover creating the plan, running the valuation, reports, import/export, and wrapping up with Report Writer demonstration and discussion.

- System Navigation
- Creating New Plans
- Creating and using Default Plans
- Non-Discrimination Testing
- Death Benefits including Life Insurance
- Imports/Exports including Census
- Reports – customizing and setting up
- Transfers from DOS
- Database Utilities

### **DC/Win**

This session will cover 401(k) coding options with an examination of the entire system.

- Sources and Eligibility
- New Comparability
- Employees including Edit Grid
- Safe Harbor Plans
- Cross Tested
- Shares and Transactions
- Investments and Receivable Elections
- Imports for Investment Companies
- Loan Processing
- Updating including periodic valuations
- DC/DC testing using Master Plans

### **DB/Win**

This session will go over running a valuation in the windows system under PPA with a discussion on proposals and takeovers.

- Screen explanations and review
- Employees including Edit Grid
- Coding benefit formulas and accrual methods, including class based formulas
- Valuations assumptions and methods
- AFTAPs and discounting contributions
- BOY versus EOY coding
- Funding Election Forms
- Updating including mini-updates
- Cash Balance Plans
- Combo DB/DC testing using Master Plans

## **RETIREMENT DOCUMENTS**

*1 day, Wednesday, 8:00 A.M.-4:30 P.M (CST)*

This class reviews the provisions of the Volume Submitter Adoption Agreement format and Prototype Adoption Agreement, and all amendments since the EGTRRA restatement.

- Using the Document System (DS) to add plans and amendments
- Creating and using Default Plans
- Prototype and Volume Submitter compliance, reliance, and the Determination Letter process
- The 5 and 6 year restatement cycles and Interim Amendments
- Types of documents – Short Form vs. Long Form, Prototypes vs. Volume Submitter
- Avoiding plan options that are difficult to administer and other plan option selection tips
- Generating Safe Harbor Notices and other employee communications
- Using DS and the DATAIR website to find answers to your questions

### **Defined Contribution Retirement Documents**

This session will cover Defined Contribution documents with a focus on CODA.

### **Defined Benefit Retirement Documents**

This session will cover Defined Benefit documents including discussion of the EGTRRA restatement deadline and registering restatements. It will also discuss Cash Balance documents.

## **CUSTOMIZED SYSTEM TRAINING**

If you wish to have customized on-site system training, we will come to your office and conduct training tailored for your needs. Alternatively, we offer one-on-one training both at our Westmont, IL office and using GoToMeeting webinar interface. Our fee for these services is \$2,000 per day, plus expenses. Travel time in excess of ½ day will be billed at \$2,000 per day in ½-day increments up to one additional day. Limited to 10 attendees/session. Please contact us for more information or to schedule on-site training.