

# Ultimate Cash Balance Seminar

Presented by DATAIR and Industry Experts

Norman Levinrad & Kevin Donovan



Join us for this highly successful and power packed two-day session on Cash Balance Plans that will leave you charged up and with the knowledge of an expert! This 4<sup>th</sup> annual seminar will bring you up to date with current Cash Balance issues.

Everything you need to know about Cash Balance plans: Theory and Practice is in this one seminar brought to you by DATAIR, Norman Levinrad of Summit Benefit, and Kevin Donovan of Pinnacle Plan Designs – all leaders in the Cash Balance industry.

The Ultimate Cash Balance Seminar will present you with Cash Balance Plans from plan design to plan termination and everything in-between:

- ✓ How to design and present Cash Balance plans
- ✓ Choose plan document provisions
- ✓ Funding issues
- ✓ Distributions
- ✓ RMDs
- ✓ Issues to avoid

Utilize DATAIR Software to provide hands-on experience reinforcing the presented concepts. The two-day session will focus on concepts and terms that the attendee should be familiar with for Cash Balance plans.

Join DATAIR on Thursday morning for an optional Cash Balance Fundamentals to enhance the two-day session. This session will be hands on and is for anyone that may not be familiar with Cash Balance terminology and/or completing the plan information in DATAIR. It will focus on system training using terms and concepts that will be presented in the seminar. It is also beneficial for those who may just need a refresher.

Don't miss this incredible opportunity! **You will leave this training as an expert!!**

## Dates:

Cash Balance Fundamentals with focus on hands-on system training (optional ½ day)  
Thursday morning, November 15, 2018

Ultimate Cash Balance Seminar (1½ day)  
Thursday afternoon, November 15  
Friday, all-day November 16, 2018

## Location:

NIU Naperville Conference Center  
1120 E. Diehl Rd.  
Naperville, IL 60563 (Suburban Chicago)

## Times: (All times are CST)

### Thursday, November 15

7:30 a.m. Registration

8:00 a.m. Cash Balance Fundamentals

12:00 p.m. Noon Class Adjourns

12:00 – 1:00 p.m. Lunch

12:30 p.m. Registration

1:00 p.m. Ultimate Cash Balance Seminar

5:00 p.m. Adjourn

### Friday, November 16

8:00 a.m. Ultimate Cash Balance Seminar

5:00 p.m. Adjourn

**Hotels:** Group Rates have been secured at the following hotels. Mention DATAIR when making reservations.

Hampton Inn, Naperville (630) 505-1400  
Room Rate: \$99/night

Country Inn & Suites (630) 505-3353  
Room Rate: \$91/night

The Conference Center is located approximately equal distance from both O'Hare and Midway Airports and just off of Interstate 88. The hotels are across the street within walking distance.

Lunch and Continental Breakfast will be provided on both days.



# The Ultimate Cash Balance Seminar Registration Form

**Cash Balance Fundamentals - Thursday morning, November 15 (optional 1/2 day)  
Cash Balance Seminar - Thursday afternoon & all-day Friday, November 15-16**

**Reserve your seat today, as space is limited!  
EARLY BIRD Registration Deadline: Friday, September 14, 2018\*  
Registration Deadline: Friday, November 9, 2018**

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

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

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

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

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

			Cash Balance Fundamentals Thurs AM		Cash Balance Seminar Thurs PM/Fri	
<u>Print Attendee name(s) below:</u>	ASPPA #	PTIN #	<i>Early Bird</i> \$175	\$220	<i>Early Bird</i> \$550	\$595
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**Total Registration Fee: \$ \_\_\_\_\_**

- Check enclosed made payable to **DATAIR Employee Benefit Systems, Inc.**
- Credit Card - Please charge my \_\_\_\_\_ AMEX \_\_\_\_\_ VISA \_\_\_\_\_ MasterCard

Cardholder's Name \_\_\_\_\_

Card # \_\_\_\_\_ CVV/CVC \_\_\_\_\_ Exp Date \_\_\_\_\_

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

City, State, Zip \_\_\_\_\_

Signature \_\_\_\_\_

**Return the Registration Form to: DATAIR Employee Benefit Systems, Inc., Attn: Training Department**

- Scan and e-mail this Registration Form to [lauriem@datair.com](mailto:lauriem@datair.com) or
- Fax this Registration Form to 630-325-2660, or
- Mail to DATAIR, 735 N. Cass Ave., Westmont, IL 60559-1100



**\* Only registration forms post marked, faxed, or emailed by September 14, 2018 will be eligible for this special rate.**

**NOTE: Please do not make flight or hotel reservations until you receive your confirmation email.**

**Cancellation Policy:** All cancellations received no later than November 2, 2018 will receive a 50% refund. No refunds will be issued for cancellations received after November 5, 2018.