

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 5th annual seminar will bring you up to date with current Cash Balance issues while you earn CE!

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 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

The session will cover concepts and terms that the attendee should be familiar with for Cash Balance plans.

Join DATAIR on Monday morning for an optional **Cash Balance Workshop** to enhance the Ultimate Cash Balance Seminar. This workshop will use DATAIR Software to provide a hands-on experience that will reinforce the presented concepts. It will focus on system training and PPA Document highlights. It is for anyone that may not be familiar with Cash Balance terminology and/or completing the plan information in DATAIR. It will emphasize terms and concepts that will be presented in the seminar. The workshop 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 Workshop (optional ½ day)
Monday morning, November 4, 2019

Ultimate Cash Balance Seminar (1½ day)
Monday afternoon, November 4, 2019
Tuesday, all-day November 5, 2019

Location:

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

Times: (All times are CST)

Monday, November 4

7:30 a.m. Registration
8:00 a.m. Cash Balance Workshop
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

Tuesday, November 5

8:00 a.m. Ultimate Cash Balance Seminar
3:00 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

Courtyard Marriott Naperville (630) 505-0550
Room Rate: \$114/night

The Conference Center is located approximately equal distance from both O'Hare and Midway Airports and just off 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 Workshop - November 4, 2019 (optional 1/2 day on Monday morning)
Cash Balance Seminar - November 4-5, 2019 (Monday afternoon & all-day Tuesday)

Reserve your seat today, as space is limited!
EARLY BIRD Registration Deadline: Friday, September 6, 2019*
Registration Deadline: Friday, October 25, 2019

Company Name	()	DATAIR Acct. No.
	Contact Phone	(*9999 if no client #)
Contact Name	Contact Email	

Print Attendee name(s) below:	ASPPA/EA #	PTIN #	Workshop	Seminar
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

(*Register by Friday, September 6th, 2019 to save \$50 on the CB Workshop and \$55 on the Seminar per participant)

Earlybird Workshop Attendee Registration*	(\$200 ×):	\$ _____
Earlybird Seminar Attendee Registration*	(\$595 ×):	\$ _____
Workshop Attendee Registration	(\$250 ×):	\$ _____
Seminar Attendee Registration	(\$650 ×):	\$ _____
Total Registration Fee:		\$ _____

- Check enclosed made payable to **DATAIR Employee Benefit Systems, Inc.**
- Credit Card <https://datairemployeebenefitsystems.mypaysimple.com/s/payment-on-account-3>
Please click on the above link or copy & paste the link into a browser. You will be directed to enter the Total Registration Fee in the first field. Enter your 4 digit DATAIR company acct # in the second field. For non-DATAIR clients, please enter 9999. You must still return the Registration Form to complete the process.

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

- E-mail this Registration Form to lauriem@datair.com, or
- Fax this Registration Form to 630-325-2660, or
- Mail to DATAIR, 735 N. Cass Ave., Westmont, IL 60559-1100



You will not be guaranteed a spot in the class until the registration form has been completed and you receive a confirmation email from DATAIR.

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

*** Only registration forms received by Friday, September 6, 2019 will be eligible for the special early bird rate.**

Cancellation Policy: All cancellations received no later than October 14, 2019 will receive a 50% refund. No refunds will be issued for cancellations received after October 21, 2019.