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## DATAIR Client of the Month—April 2018

"DATAIR always has the answers"



This month, we interviewed DATAIR client Raymon Alperstein AIA, EA, MSPA, ASA, of Profit Planners LLC, about his background and

relationship with DATAIR. Raymon, a native of South Africa, attended the University of Witwatersrand where he majored in Statistics and Computer Science. During non-business hours, you can find Raymon enjoying spending time with his wife, two children, and two grandchildren. His hobbies include racquetball and bowling, and while he has yet to bowl a 300 game, he has had an opponent do it!

Raymon began his career with Prudential, PLC, exploring various departments until he landed a position in the Pension Department. In 1985, Raymon relocated to the Chicago area where positions at independent TPAs enabled him to become familiar with the various pension software vendor's programs. In 2006, Raymon became the owner of Profit Planners LLC, a long-time client of DATAIR. Raymon and the

firm offer customized plan design, including DC, DB, Cash Balance, and combined plans.

### A complete solution

Raymon cited several positive DATAIR software features he appreciates, including its all-encompassing capabilities with little requirement for outside solutions, such as spreadsheets to complete calculations. He finds the Defined Benefit System to be very robust and values the different funding methods.

### Support and updates

Raymon and his staff are very pleased with DATAIR's customer support, stating his staff finds it convenient they can reach out for technical support via phone and email. They also appreciate that DATAIR has multiple staff that offer expert advice for each system. Before becoming the owner of Profit Planners, Raymon had not used DATAIR's software, but says he was pleased to discover it was quick and easy to become proficient. Likewise, new hires to the firm adapt quickly to the software, resulting in continuous work-flow performance. Raymon also likes the timely updates for critical regulations as well as

system enhancements, noting he was particularly happy when DATAIR updated the DB System for multiple decrements.

### Industry changes

Like many of us in the industry, Raymon is always concerned about what governmental regulations will impact the industry, including the possibility of reducing deferral limits. He also shared concern over the wave of consolidation with big firms buying up smaller TPAs. Raymon believes smaller TPA firms, such as his, can offer individualized service and customization.

### A business partner

Raymon considers DATAIR to be a partner not just a vendor: "Microsoft is a vendor; DATAIR is an integral part of my business." According to Raymon, *"DATAIR always has the answers."*

If you are ever in the northern suburbs of Chicago and want to play racquetball or bowl a frame, look Raymon up!