



Defined Benefit/Cash Balance Pension Valuation Systems

Proposals, Valuations, Non-Discrimination & Reporting

- ◆ **Defined Benefit Plans**
- ◆ **Cash Balance Plans**
- ◆ **412(e) Plans**

Proposals

- Multiple Plan Designs
- Plan comparison of contributions and formulas
- Cost/Benefit Analysis

Valuation and Administration

- Compliance with current funding regulations
- Funding Segment Rates
- Automatic rate look-up calculations
- Effective Interest Rate (EIR) calculation
- AFTAP Calculation Results throughout the year
- 430 Minimum & 404(o) Maximum Contributions
- Cushion Amount & At-Risk calculations
- Probability of optional forms of payment
- 415 Limitations for funding and distributions
- 417(e) calculations automatically applied
- AFTAP certifications & notices on demand
- Prescribed mortality tables always current
- Generational mortality tables
- Distributions with optional forms & relative values

Contributions

- Minimum Required Contribution (MRC) application of discounted contributions
- Quarterly contributions, 436 contributions, and unpaid prior year amounts
- Carryover and Prefunding Balances maintained & applied



Non-Discrimination & Other Testing

- Combined plan testing made easy
- 410(b) Minimum Coverage & Average Benefit Percentage Tests
- 401(a)(26) Minimum Participation Test
- 401(a)(4) General Tests, Normal & Most Valuable Accrual Rates with detailed log

Schedule SB

- Schedule SB Report with details
- EFAST approved attachments
- Quick & Easy transfer to Government Forms, no typing

PBGC Reporting

- Premium calculation details and liabilities
- Annual Funding Notice
- Supplement calculations

System updates available as regulations change or enhancements are made.

*For additional information, please contact a
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