



# Retirement Plan Documents

## Prototype, Volume Submitter, and IDP Documents

- ◆ 401(k) Plans & Profit Sharing Plans
- ◆ 403(b) Plans
- ◆ Defined Benefit
- ◆ Cash Balance
- ◆ Money Purchase
- ◆ Ask about our Cafeteria Plans

### Choose your Plan Type

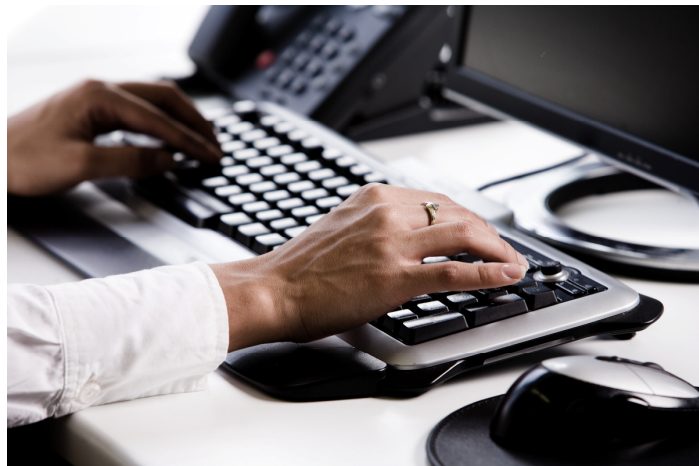
- Prototypes in Standardized & Non-Standardized Long Form & Short Form Adoption Agreements
- Volume Submitters
  - Adoption Agreement Format
  - Individually Designed Plan (IDP) Format

### A Complete Package

- Plan design checklist/Adoption Agreements
- Plan & Trust documents
- Board Resolutions
- Summary Plan Description
- Interim & Optional Amendments
- Policies: Loans, Plan Expense, and more
- Notices including Automatic Enrollment & Safe Harbor
- Ancillary & Employee Forms
- Forms Packages for quick printing
- IRS Forms—5300, 2848, 8717, SS-4, etc.

### Choose your Document Sponsor

Register our documents in your company's name or let DATAIR be your document sponsor.



**“Easy to Use and Easy to Learn”**

### Provisions/Amendments

- Safe Harbor Plans
- Roth Contributions
- Automatic Enrollment, QACA, QDIA
- Cross-Tested - class or per-participant allocations and accruals
- Multiple Employer Addendum
- And Many More!

### Other Features

- Multi-Plan Operations - print all plans at one time for Notices & Forms
- Compare provisions with Pension System
- Transfer provisions to/from Pension System
- Default Plans can be used to quickly set up plans
- Form completion validations
- Amendment History

System updates available as regulations change or enhancements are made.

**For additional information, please contact a  
DATAIR Sales Representative at  
(888) 328-2474 or visit [www.datair.com](http://www.datair.com)**



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