



2024 DIRECTORY OF EDUCATIONAL SERVICES

SYSTEM	DECEMBER	FEE	DAY	TIME
Defined Contribution	9-10	\$700	Monday-Tuesday	8:30-4:30 (CST)
Defined Benefit	11	\$500	Wednesday	8:30-4:30 (CST)

* Sign up for all three days for \$1,000 total

Company Name

(_____) _____
Contact Phone

DATAIR Acct. No.

Contact Name

Contact Email

I/We would like to attend the following session(s) for the month of **December**:

<u>Print Attendee name(s) below:</u>	Defined Contribution <u>\$700</u>	Defined Benefit/ Cash Balance <u>\$500</u>	
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

Subtract \$200 for each person that is signed up for both DC and DB /CB \$ _____

TOTAL \$ _____

Method of Payment: **(Payment is required with registration and cannot be charged to your account.)**

_____ Check enclosed made payable to **DATAIR Employee Benefit Systems, Inc.**

_____ Credit Card - Please charge my: _____ AMEX _____ VISA _____ MasterCard

Cardholder's Name: _____ Credit Card #: _____

CVV/CVC (3 digits on the back of a Visa or MasterCard or 4 digits on the front of an American Express card): _____

Credit Card Billing Address: _____

Signature: _____ Exp Date: _____

NOTE: Please do not make flight or hotel reservations until you receive confirmation. Registration Forms received less than 2 weeks prior to training are subject to class availability.

Cancellation Policy: A full refund will be issued for cancellations received more than 5 business days prior to class; cancellations received less than 5 business days will be charged the full registration fee.

Return the Registration Form to:

DATAIR Employee Benefit Systems, Inc., Attn: Training Department

735 North Cass Avenue, Westmont, IL 60559-1100 | Fax: (630) 325-2660 | E-mail: info@datair.com

TRAINING TIPS

In order to benefit from system training, you should have some familiarity with the system and sufficient expertise in the employee benefits area handled by that system. Please do not come for training too soon; that is before you have at least installed and experimented with the system in your office. We recommend at least 2 weeks of exposure to the system before you attend the training session. This way you can “know what you don’t know” and make your time with us as productive as possible. Some of the classes will also work in groups to get hands-on training.

Also, you should make plans to spend time practicing on a test plan as soon as you return from the training session. If you do not put what you learn into practice immediately, you may lose much of the benefit of the training. You will reinforce what you’ve learned in class by setting up a small test plan and experimenting with it. It’s a good idea to have some level of comfort with the software before you tackle your largest and most complicated plans. We also suggest that the DC and DB attendees stay for the Import and Export (.dia) session to learn how to get the most benefit from the data import and data entry tools!

To make the most out of your training experience, please arrange your travel plans so that you are available for your entire session.

CONTINUING EDUCATION CREDITS

Continuing Education certificates are available for all attendees of classes in Westmont. Training certificates should be submitted for professional designation credit under the rules provided by each organization. Training classes are *not* pre-approved for continuing education.

DATAIR’S WEBSITE AND E-MAIL

DATAIR’s website and e-mail provide for the exchange of electronic mail, transfer of plan data files, and to allow downloading of program updates to releases. In addition, news about each of DATAIR’s systems is available at our website. Join our system discussion forums for the exchange of ideas and information about topics of interest to the employee benefit community. Visit us at <http://www.datair.com> and e-mail us at info@datair.com.

EDUCATIONAL CLASSES

Defined Contribution (DC): A to Z

This *two day* session will cover the system selections and coding advanced options for Defined Contribution plans. This session will introduce you to creating the plan, running the valuation, reports, and an overview into the magic of import and export. Emphasis will be on 401(k) plans. Working knowledge from using the system is required for this session.

- System Navigation
- Creating New Plans
- Creating and using Default Plans
- Discussion of system screens (Plans, Sources, Employees, Investments and Transactions)
- Employees including Edit Grid
- Employee Eligibility, including Otherwise Excludable
- Employee Compensation for Allocation, Testing and other purposes
- Imports/Exports including Census
- Transactions, including shares
- Receivable Elections options
- Non-Discrimination Testing selections, options, and reports
- Reports – options, setting up, and groups
- Safe Harbor Plan Allocations and Coding
- Cross Tested Allocations/Testing/Maximizing formula
- Coverage Testing and Discrimination Testing Reports
- ADP/ACP Tests
- Imports for Investment Companies
- Updating including periodic valuations
- Military Spouse coding and effects on plan
- Qualified Student Loan Payments
- Roth Employer, Match, Safe Harbor Sources
- Long Term Part Time Employees
- Plan Comparison
- DC/DC combined plan testing using Master Plan
- Multi-Plan Operations
- Database Utilities

Defined Benefit & Cash Balance (DB/CB)

This is an intensive *one day* course that covers all options in the system. Some previous defined benefit experience is required. Actuarial concepts and system coding for desired valuation results will be discussed. Working knowledge from using the system is required for this session.

- Plan Level specifications for DB/CB plans including Provisions, Assumptions, Death Benefits, and ASOP's
- Coding benefit formulas and accrual methods for traditional DB plans
- Cash Balance Plans (Pay Credits, Interest Credits, and Assumptions)
- Coding allocation formulas for CB plans including class-based formulas
- Reviewing the valuation results at the Employee Level (Late retirees, distributions grid and offsets)
- Valuation results at the Plan Level (Contributions, AFTAP's, shortfall amortization bases, and maintaining the PFB)
- PBGC covered plans (Flat-rate and Variable-rate Premiums and the Annual Funding Notice)
- BOY vs. EOY valuation dates coding & testing differences
- Sole proprietors and partnerships
- Plan amendments (including two-year restrictions in the 404-cushion amount for HCE's)
- Reports (Proposal, Valuation, Setup, Groups)
- Funding Election Forms and Funding Relief options
- Common errors and omissions
- Updating to next plan year and how mini-updates are beneficial
- Combo DB/DC proposals and compliance testing using Master Plans
- Reviewing the testing assumptions and methods
- Reviewing testing results and Combined Reports
- Transfer of Schedule SB to 5500s and related attachments
- Distribution calculations including RMD's
- System Utilities (Rate of Return Calculator and Actuarial Factors)

CUSTOMIZED SYSTEM TRAINING

If you cannot attend on a set date and/or wish to have system training that is tailored to your needs, you can attend customized training. Please contact us for more information or to schedule customized training.

Webcast: Your office can arrange customized web training in 1 or 2 hour increments to cover short topics. Our fee for this is billed at \$275 per hour rounded to the next half hour. Minimum of 2 hours will be charged. Limit of 8 hours in a calendar quarter can be scheduled.

At DATAIR: You come to the Westmont office for small group and individual classes. Our fee for these services is based on the class setup and time allotted.

In-Person: We will come to your office and conduct training tailored for your needs. Our fee for these services is \$2,000 per day plus expenses up to 12 people. Travel time in excess of ½ day will be billed at \$2,000 per day in ½-day increments up to one additional day.

DATAIR SYSTEM WEBINARS

DATAIR provides free webinars throughout the year. Topics are current and relative to features and enhancements in the software. Topics follow the trends for support requests as well as any regulation changes that require system changes.

The webinars are announced in the DATAIR Discussion Forums approximately a week before the webinar. Attending the live webinars provides the opportunity to ask questions while the webinar is in session. The webinars are recorded and available within 48 hours of the live webinar. The recorded webinars can be watched as many times as desired with no limit to the number of people in your office watching.