



Pension Education Series

Comprehensive Training to Enhance All Facets of Plan Management

For years, AccuDraft has been the undisputed leader in the end-to-end generation and management of pension plans and related documents. The depth and breadth of our services has enabled us to provide our clients with solutions that are unrivaled by any other document provider in the industry. As a result, they've realized optimum efficiency and profitability in their most critical document production and maintenance processes.

What makes AccuDraft's pension plan document solutions so unique?

- **Flexibility** – we support the broadest range of plan types, including specialty plans such as HSA, UniK, 403b, and 457, as well as virtually any plan document, including ancillary contracts and correspondence.
- **Completeness** – from pre-approved documents, Volume Submitter and Prototype plans, and state-of-the-art technologies for automated creation, through best practices consulting, training, and ongoing support for all systems and documents, we give plan providers everything they need to succeed.
- **Knowledge** – we employ some of today's most skilled and knowledgeable ERISA attorneys and paralegals, and certified document professionals, who are available to help our customers with any pension plan document need.
- **Reporting** – unlike other solutions that simply automate the creation and storage of plan documents, we provide true document intelligence through the in-depth analysis of keywords, provisions, workflow statuses, and more.

Today's Most Comprehensive and Effective Pension Education

Now, we're further extending our portfolio of offerings to include a series of informative and insightful educational programs. These 90-minute courses will be delivered by industry professionals who possess decades of experience, and are designed to empower companies and individuals in the plan industry with the skills and knowledge they need to succeed.

Attendees will learn about the latest plans, regulations and guidelines, and industry trends, as well as tips and techniques for keeping on top of them and ensuring consistency, accuracy, and quality in all plan management activities.

Our comprehensive and cost-effective courses are convenient and highly accessible – they can be conducted at our site, at yours, or via the Web – and are structured to address the varied training needs of specific vertical sectors and job functions.

Current Offerings Include:

| Getting Started | Plan Features | Best Practices | Specialty Plans |
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| <p>Course #1 <u>Plan Overview</u> A complete overview of the EGTRRA document including:</p> <ul style="list-style-type: none">✓ Format✓ The interview✓ What's changed✓ Increased flexibility✓ New design options✓ Keys for effective data entry✓ Amendment options | <p>Course #1 <u>Prevailing Wage Plans</u> A comprehensive overview of plans that include prevailing wage contributions, including:</p> <ul style="list-style-type: none">✓ Rules✓ Plan design alternatives✓ Operation✓ Administration✓ Opportunities | <p>Course #1 <u>The Troubled Plan</u> Many companies are experiencing financial difficulties. This course will help you assist troubled clients through plan design, payment for services, and plan termination.</p> | <p>Course #1 <u>Government Plans</u> An overview of the types of plans that can be sponsored by government agencies, and special rules that apply with respect to the operation and administration of such plans. This course also explores qualified plans, 403(b), and 457(b) opportunities.</p> |
| <p>Course #2 <u>Document Defaults</u> A review of the decision-making process, and key considerations for selecting document interview default responses. Careful selection will help create uniformity and administrative efficiencies.</p> | <p>Course #2 <u>Automatic Contributions</u> A discussion of the various types of ACAs, and the requirements of each, as well as a review of the viability of an ACA program, key benefits, and plan design alternatives.</p> | <p>Course #2 <u>Reliance and Determination Letters</u> Discusses the rules of reliance, what to do when reliance on the pre-approved letter is lost, and when to apply for a Determination Letter.</p> | <p>Course #2 <u>The 403(b) Marketplace</u> Key reasons why you may want to enter (or stay) in the 403(b) market, as well as a review of plan design opportunities ranging from the simplest to the most complex.</p> |
| <p>Course #3 <u>Use of Administrative Policies</u> AccuDraft's EGTRRA documents include administrative policies that defer to ancillary documents, with respect to certain aspects of plan operation, without requiring an amendment or loss of reliance on the plan's pre-approved letter.</p> | <p>Course #3 <u>Safe Harbor Plans</u> Highlights the operation and administration of Safe Harbor 401(k) plans, and offers best practices in plan design.</p> | <p>Course #3 <u>Document Management & The Electronic Office</u> Suggestions for efficient document preparation, report writing, and management including use of advanced technology for document delivery, execution, and record retention.</p> | <p>Course #3 <u>DB Administration 101</u> A primer on defined benefit plan opportunities, including cash balance and the new DB/K. A profile of the businesses that may be suited to move to or add a defined benefit plan will also be provided.</p> |
| | <p>Course #4 <u>Plan Redesign</u> Suggestions for smarter, more administratively feasible and flexible plan redesign, including to Roth or not to Roth, plan loans, in-service distributions, and other features.</p> | <p>Course #4 <u>Plan Amendments</u> Discusses strategies for performing required and/or discretionary amendments, timing of plan amendments, and how to handle late or incorrect amendments or restatements.</p> | <p>Course #4 <u>ESOPs</u> An overview of various ESOP design alternatives, as well as design and consulting trends in the ESOP marketplace.</p> |

Additionally, all courses can be fully customized to address any specific education requirement.

Find Out More

Want to learn more about how AccuDraft can provide you with the expertise you need to succeed? Visit <http://www.accudraft.com/services/pensioneducation.asp> to find out more about our new Pension Education Series, and how it can benefit your organization. Or, email us at info@accudraft.com to schedule your session today!



About AccuDraft

AccuDraft is a leading provider of Web-based Contract Lifecycle Management solutions built on unique, leading-edge rules-based capabilities. Since 1992, AccuDraft solutions have helped hundreds of clients – from small organizations to Fortune 500 companies – increase efficiency and reduce costs and risk by transforming the way they create, track, and manage their most critical business documents.

Orlando, FL
801 International Parkway
Suite #500
Lake Mary, FL 32746
407-774-8321
800-752-6362

New York, NY
2 Penn Plaza
Suite 1500
New York, NY 10121
212-292-5080
info@accudraft.com