

GTS System

GTS, an interactive system designed by George Taylor, creates combined plan illustrations; including DB Cash Balance and DC New Comparability plan designs.

GTS performs combined plan IRC401(a) non-discrimination testing and prints client-ready reports.

1. APPLICATION FEATURES

- + Supports interactive calculations; modify assumptions and see results immediately
- + Creates illustrations for combined DB and DC plans in one calculation run
- + Creates plan proposals for prospective clients
- + Performs 'What If' scenarios for existing plans
- + Performs testing for aggregated DB/DC plans
- + Performs testing for individual DB or DC plans
- + Performs 401(k) Average deferral percentage test
- + Performs 401(m) Average contribution percentage test
- + **GTS to BLAZE SSI PENDEAS Interface:**
GTS data may be imported into the PENDEAS System, which supports multiple plan design comparisons and a wide selection of pdf reports and MS Excel charts.

2. USER INTERFACE

- + Easy and familiar MS Excel workbook
- + Simple data entry with all MS Excel editing features, such as copy & paste, available
- + Pre-formatted reports created within the workbook
- + Additional reports may be created by the user
- + Exportable output
- + Comprehensive documentation available within the workbook

3. CUSTOMER SUPPORT

- + System updates for government regulations included in subscription service
- + Helpline support included in subscription service
- + Live and recorded on-line webcasts included in subscription service
- + Custom training seminars available

4. OPERATING ENVIRONMENT SUPPORTED

- + MS Windows XP Professional or MS Vista (Business or Ultimate) Operating System
- + Computer sufficient to support the OS; plus 128MB RAM (or higher) for the application
- + MS Internet Explorer 5.5 or higher; Internet connection required
- + MS Excel 2002 or later required

5. AVAILABLE REPORTS

- + Calculation results
- + IRC 401(a)(26) Minimum Participation Test
- + IRC 410(b) Minimum Coverage Test
- + IRC 416 Minimum Top Heavy Test
- + Gateway Test
- + IRC 401(a)(4) Accrual Rate Test