

Minimum Distribution System

The **Minimum Distribution System** calculates the minimum required distribution and the earliest required distribution date for participants of corporate or owner-employee defined contribution employee benefit plans, 'Simple' plans, IRAs and IRA rollovers.

1. APPLICATION FEATURES

The Minimum Distribution System calculates and illustrates the minimum required distribution from a corporate or owner-employee qualified defined contribution plan or IRA and the dates that payments are to be made under the current regulations.

The system is simple to use and produces easy to understand reports for the plan participant that illustrate the current year's distribution or the projected distribution for any number of years in the future.

The Minimum Distribution System supports estimates of future plan contributions to facilitate planning for projected distributions.

2. USER INTERFACE

- + Easy and familiar Windows user interface
- + Enter, edit, open and save data files
- + Automated data validation and entry error trapping
- + Reports created in pdf format with no additional software required
- + Easy emailing and printing of reports
- + Comprehensive Intro Guide

3. CUSTOMER SUPPORT

- + System updates for government regulations included in maintenance service
- + Unlimited phone, fax and email HelpLine support included in maintenance service
- + National and regional user seminars
- + Basic and customized training seminars
- + Systems consulting and custom programming 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
- + Free Adobe Reader version 6 or higher