

## PLAN TERMINATION SYSTEM

The **BLAZE SSI Plan Termination System** computes termination liabilities for all types of qualified retirement plans. The system prints plan sponsor and participant information notices and other forms related to plan termination.

### 1. APPLICATION FEATURES

- + Permits user-selected plan termination date, date of distributions and assumptions
- + Permits user-selected methods for computation and display of allocation of excess assets
- + Computes Defined Benefit termination liability for non-forfeitable retirement benefits
- + Tests for sufficiency of assets for a non-adverse PBGC termination
- + Prepares documents for PBGC termination
- + Prepares documents for notification of "interested parties"
- + Determines IRC417(e)(3) minimum present value of benefits using segmented rates
- + Conforms to IRC Sections 411(a) (11) and 411(e)
- + Links with **BLAZE SSI GOVFORMS 5300 System**
- + Integrated with **BLAZE SSI EBP SYSTEM**

### 2. USER INTERFACE

- + Easy and familiar Windows user interface
- + Introductory workflow and comprehensive context sensitive 'HELP' documentation
- + Automated data validation and entry error trapping and data comparison utility
- + Numeric, text-based, basic and custom format reports
- + Reports automatically prepared in .pdf file for screen view, hard copy and email
- + Electronic interface with **BLAZE SSI GOVFORMS** Systems

### 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
- + **BLAZE SSI EBPII** System required
- + Free Adobe Reader version 6 or higher

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# PLAN TERMINATION SYSTEM

## CURRENTLY AVAILABLE PRE-FORMATTED SYSTEM REPORTS

- Employee-level census information
- Lump sum and present value of accrued benefits
- Accrued and vested benefits
- Lump Sum and present value of vested benefits
- Individual employee statements
- Notice to interested parties
- Corporate resolution terminating the plan
- Notice of intent to terminate and notice to employees
- Post distribution certificate
- Notice that participant elected a non-annuity form of payment
- Notice of plan benefits
- Distribution option selection
- Notice of withholding on distributions
- Election for payees of non-periodic payments
- Final asset allocation
- Lump sum distributions

## LINK TO BLAZE SSI GOVFORMS 5300 SYSTEM (Optional Add-on to Plan Term System) GOVFORMS Series 2: IRS 5300 Series Forms

- IRS 2848, Power of Attorney
- IRS 5300, Application for Determination for Employee Benefit Plan
- IRS 5307, Application for Determination (Master/Prototype/Volume Submitter)
- IRS 5310, Application for Determination for Terminating Plan
- IRS 5330, Return of Excise Taxes
- IRS 6088, Distributable Benefits
- IRS 6406, Short Form Application for Determination of Minor Amendment
- IRS 8717, User Fee for Employee Plan Determination Letter Request
- IRS Form SS-4
- IRS Schedule Q, Non-discrimination Requirements
- IRS Notice to Interested Parties

### PBGC Forms:

- PBGC FORM 1
- PBGC FORM 1-ES
- PBGC FORM 1, Schedule A
- PBGC FORM 1-EZ
- PBGC FORM 10, Post-Event Notice of Reportable Events
- PBGC FORM 10, Advance Notice of Reportable Events
- PBGC FORM 500, Schedule EA-S, REP-S
- PBGC FORM 501, Schedule MP, Attachments A, B, and Payment Voucher
- PBGC Notice of Plan's Funding Level

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