

GTS

GTS, an interactive system designed by George Taylor and BLAZE SSI, 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 PDF 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

2. USER INTERFACE

- + Easy and familiar Windows/Excel user interface
- + Attractive selection of PDF reports included
- + Introductory Guide and on-line documentation

3. CUSTOMER SUPPORT

- + System updates for government regulations
- + Unlimited email Helpline support
- + Integrated system documentation
- + Pre-recorded on-line webcasts
- + 'Live' training available for new users

4. OPERATING ENVIRONMENT SUPPORTED

- + MS supported Windows OS; Internet connection
- + Computer sufficient to support the OS; plus 1GB RAM (or higher) for the application
- + MS .NET Framework 7.0; PDF Viewer

5. AVAILABLE REPORTS

- + Cover page with company graphic/logo
- + Calculation results
- + IRC 401(a)(4) Accrual Rate Test
- + IRC 401(a)(26) Minimum Participation Test
- + IRC 410(b) Minimum Coverage Test
- + IRC 415 Limitation Test
- + IRC 416 Minimum Top Heavy Test
- + Gateway Test
- + 70% Ratio and Average Benefits Test