

Individually Designed Plans

SunGard's individually designed document preparation service includes volume submitter- approved plan, trust, SPD, plan administrator's guide, administrative and election forms fully customized to the plan, IRS submission Forms 5300/5307, notice to employees, adopting resolution, and plan specification index. All plans and Supporting Forms Packages can be processed through our **On-Demand Service** via the Internet or our **Premium Fax-Mail Service** that provides a more 'hands-on' approach for processing your plan documents.

Benefits

- Low IRS user fees with SunGard's Volume Submitter status
- Design flexibility - our checklist approach offers the flexibility you need to meet your client's needs
- Occasional to substantial language change capability
- Complete document packages created from one checklist: plan and trust, SPD, and all notice, election, and IRS submission forms
- Assistance with IRS plan approval

Volume Submitter and Individually Designed Plans for:

- 401(k)
- Profit Sharing
- Money Purchase/Target
- ESOP/Stock Bonus
- Defined Benefit
- 403(b)

Select from several different Volume-Submitter and Individually Designed supporting forms packages that include:

- Summary Plan Description, written in an easy-to-read Q&A format
- Administrative Forms (Corporate Resolution, Notice to Interested Parties, Beneficiary Designation Form, Enrollment Forms, etc.)
- IRS Tax Forms - such as the 5307, Schedule Q, and 2848
- Plan Administrator's Guide - a comprehensive tool to assist the Plan Administrator or Human Resource Manager in complying with the rules governing the day-to-day operations of the plan. It even has a compliance calendar!
- Index - a thumbnail sketch of the employer's elections - telling you where to find them in the Adoption Agreement and plan document

Relius Documents is your solution for ensuring qualified plans for your clients.

For more information, call 800-326-7235, ext. 1100.