

PC Features

SunGard's Relius Documents PC application offers you various different levels of subscription based upon the type of plan documents you need. In addition to retirement plan documents, the application also offers both flexible spending account plans and premium only plans, plus election forms and summary plan descriptions. Also, you can get additional functionality within your system with the enhancement modules.

Level 1: This level provides documents as needed on a per-document fee basis. *

- Volume Submitter & Individually Designed Plan
- Profit Sharing, Money Purchase, 401(k), Defined Benefit, and Target Benefit
- ESOP, Stock Bonus, 403(b)
- Cafeteria

Prototype Supporting Forms Package

- Profit Sharing, Money Purchase, and 401(k)
- Defined Benefit and Target Benefit
- Defined Contribution "Prototype Formatted" Volume Submitter
- 403(b)

Level 2: Twelve document packages per contract year. Any of the 12 documents unused in a contract year may be carried forward to the next contract year. If more than 12 documents are needed, these may be purchased in packages of three. *

Volume Submitter & Individually Designed Plans

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

Level 3: This level provides unlimited document generation. *

- Volume Submitter and Individually Designed Plans
- Defined Contribution Module: Profit Sharing, Money Purchase, 401(k), and Target Plans, ESOP, Stock Bonus and 403(b)
- Defined Benefit Module
- ALL Individually Designed Plan Modules: Includes all Individually Designed plan modules listed above and Cafeteria

Cafeteria Module

- Cafeteria Module: Flexible Spending Account Plans and Premium Only Plans

Prototype Supporting Forms Modules

- Defined Contribution Module: Profit Sharing, Money Purchase, 401(k), and Target
- Defined Benefit Module
- Fundamental Defined Contribution
- Defined Contribution Volume Submitter "Prototype Formatted"

403(b) Module

*All document packages include IRS submission forms plus all required supporting forms.

Enhancement Modules

- Multi-Doc Processing
- Document Reporting system (DRS)
- Portable Document Format (PDF)
- Short Amendment
- Tracking

For more information or to schedule a demo, call 800-326-7235, ext. 1100.