



# Retirement Plan Document System

For all your Plan Document Needs

- ◆ 401(k) Plans & Profit Sharing Plans
- ◆ 403(b) Plans
- ◆ Defined Benefit Plans
- ◆ Cash Balance Plans
- ◆ Money Purchase Plans
- ◆ Ask about our Cafeteria Plans

## A Complete Package

- Adoption Agreements
- Base Plan Document
- Trust Agreement
- Summary Plan Description
- Sponsor Level Amendments
- Plan Level Amendments
- Administrative Policies: Loans, Plan Expenses, Insurance
- Auto-enrollment: ACA, EACA and QACA
- Forms Packages for quick printing
- IRS Forms: 2848, 5300, 5307, 8717, 8821, SS-4

## Provisions

- Safe Harbor Plans
- Roth Contributions
- Automatic Enrollment, QACA, QDIA
- Cross-Tested - class or per-participant allocations and accruals
- Prevailing Wage
- Multiple Employer Addendum
- And Many More!



**“Easy to Use and Easy to Learn”**

## Other Features

- Multi-Plan Operations - print all plans at one time for Notices & Forms
- Default Plans can be used to quickly set up plans
- Compare provisions with Pension System
- Transfer provisions to/from Pension System
- Form completion validations
- Amendment History

## Choose your Document Sponsor

Register our documents in your company's name or let DATAIR be your document sponsor.

System updates available as regulations change or enhancements are made.



**CalcAir**  
Employee Benefit Systems

*For additional information, please contact a  
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