

Both web and premise-based systems available. The choice is yours.

The Solution For All Your Cash Balance Needs

Included with ASC's Defined Benefit System

- **Multiple cash balance formula plans for multiple groups**
 - Fixed Dollar
 - Percent of Compensation
 - Minimum or maximums of fixed % of pay or fixed dollar amounts
 - Step formulas
 - Tiered formulas
 - Fixed % of maximum 415 lump sum payable immediately
 - Unitized minimum contribution credit solver to satisfy 401(a)(26) meaningful benefit accruals on annual or accrued to date basis
 - A+B design for plans converting from traditional to cash balance plans
 - Override options at plan and participant level
- **Budget solver and proposal reporting for new Cash Balance/DC combo plans**
- **Assign formulas for up to 99 different groups!**
- **Compliance testing and reporting**
- **Participant cash balance history, funding calculations, and reporting**
- **Flexible funding methods for most cash balance plans and assumptions**
 - Variable interest crediting rates
 - BOY valuations, recalculate prior year expected contribution credit with actual compensation and service
 - Optional use of annuity substitution factors
 - Option to allow decreasing account balance with tracking of 'principal only' balance
 - Interest calculations for short plan years
 - Basic and advanced methods for calculating at-risk loads
- **Employee statements - standalone cash balance or combined with DC plan**
- **Employee Termination reports - choice to calculate optional forms of payments using account balance or actuarial equivalent of normal form**
- **Robust checking resources for all of your actuarial review needs**
- **Integration with ASC's suite of solutions; including plan documents, 5500s, and client & task tracking (CRM) solutions**

Intelligent Automation in Action!

Batch calculations and reports | Generate mass census requests | Run reports across all plans

Supported by full-time, on-staff, credentialed actuaries



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Retirement Plan Software, Documents & 5500s

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