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THE STRENGTH

RELIUS PROPOSAL

RELIUS DOCUMENTS

RELIUS ADMINISTRATION

RELIUS GOVERNMENT FORMS

RELIUS EDUCATION

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Great tools used  
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# THE STRENGTH OF RELIUS

Great tools used well create great solutions. Relius.

*Propose, create, administer, and report on your clients' employee benefit plans. Our solutions are supported by our educational expertise providing a complete comprehensive approach for your business.*

## RELIUS PROPOSAL

A complete qualified plan proposal solution used nationwide by plan consultants, agents, financial advisors, CPAs, and other professionals in the employee benefit industry.

- Designs available for all types of qualified plans
- Side-by-side comparisons of plan types
- Powerful solving routines to optimize plan benefits
- Capability to minimize hand-entered data through exporting and importing functionality
- Standard or customized reports

## RELIUS DOCUMENTS

A comprehensive document generation solution for law firms, third party administrators, banks, CPAs, and insurance companies that produce qualified retirement plans and health plans.

- Plan documents, adoption agreements, summary plan descriptions, and supporting forms packages
- Prototype documents submitted to the IRS on your behalf
- Data export capabilities to Relius Administration and Relius Government Forms

## RELIUS ADMINISTRATION

An integrated software solution for pension administration and recordkeeping used in pension and benefit firms across the country.

- Defined Contribution, Defined Benefit, 403(b), 457, §125 plans, HRA, and HSA
- Balance forward or daily valued recordkeeping
- Comprehensive compliance testing
- Web access for participants, plan sponsors, and plan advisors
- Powerful automation of standard administrative and recordkeeping workflow routines
- Integration with major financial institutions
- Professional standard or customized reporting
- Data exporting capabilities to Relius Government Forms, Relius Documents and Relius Proposal

## RELIUS GOVERNMENT FORMS

An industry-leading provider of software and services for completing government forms related to employee compensation and benefit plans for accounting professionals and third party administrators.

- 5500s, 5300s, SARs and 1099/W-2s series
- EFAST-compliant, Electronic Filing (ELF) capable 5500 package for producing DOL/IRS Form 5500 and related schedules, various 990 forms, PBGC forms, and other forms pertinent to these filings
- Secure Web delivery tools for distributing annual 5500 filing packets to Plan Sponsors
- EFAST resource on complex 5500 form and schedule problems
- Generator for SAR and Disclosure Notices based on Form 5500
- Electronic/magnetic filing software, laser forms and supplies, and outsourcing services for 1099 and W-2 forms
- 5300 package for creating plan qualification and termination filings

## RELIUS EDUCATION

Online and live seminars, and other industry-related products for third party administrators, recordkeeping specialists, tax attorneys, and pension benefits consultants.

- 150+ pension seminars conducted by industry experts on a range of timely topics for CE credit – held nationwide and via the Internet
- Interactive, self-paced online pension training courses for those new to the plan administration and recordkeeping industry – **Pension Elements and Pension Educator**
- Timely, ERISA-focused publications and ERISA Forms available through **The Pension Library**
- Custom communication pamphlets for educating employees on the latest benefit options

For more information on Relius solutions, call **800-326-7235 ext. 1100** or visit **www.relius.net**.