RETIREMENT EDUCATION

RETIREMENT SOLUTIONS

FIS' Retirement Education Series features a variety of retirement education programs, with live classroom set-up, throughout the year. We cover everything from industry trends and timely legislative issues to in-depth training on specific plan administration topics. It is an opportunity to gain knowledge, stay current and earn Continuing Education (CE) credits.

This series is ideal for pension consultants, administrators, CPAs, attorneys, actuaries, trust officers, financial advisers, corporate HR professionals, employee benefits, payroll staff and anyone who provides retirement plan information to plan participants.

Conference, seminars and webinars

FIS' Retirement Education Advanced Pension Conferences offer a combination of general and concurrent sessions that address topics, such as new plan design techniques, industry trends and compliance issues and are presented by nationally recognized employee benefit professionals.

In addition, seminars are held annually in cities nationwide as live and recorded web seminars, and private on-site seminars. FIS' established ERISA attorneys, teach retirement education courses, seminars and conferences. Each seminar includes an analysis of current pension developments, as well as a discussion of timely topics. Live seminars feature the added opportunity for you to ask questions and receive comments directly from experts.

Benefits

- Two Advanced Pension Conferences per year.
- Courses for plan administrators and plan sponsors leveraging multimedia-based instruction to effectively deliver concepts.
- Includes access to on-demand library of archived web seminars.
- Provides clear, consistent, and centralized messaging and reduces training investment by utilizing online resources.
- Offers different levels so you can choose the program that meets your needs and budget.
- No prerequisite nor advanced preparations required and helps keep you up-to-date on industry developments.
- Accepted by most professional organizations for continuing education credit.
- Allows you to review webinars at a convenient time that fits your schedule.

Pension Library

Available online, the Pension Library offers the value of four publications in one each outlined below. ERISA Forms Online can also be purchased separately and offers online access to checklists, worksheets and more than 350 forms and notices that can be modified and printed to help administer retirement plans.

- **ERISA Research Guide** updated semiannually reviews major substantive ERISA/qualified plan topic laws, for legislative changes, court cases and DOL/IRS guidance.
- **ERISA Newsletter** delivers current ERISA topics and legislative information in clear, concise laymen's terms, and is updated bimonthly.
- **ERISA Current Developments** provides reporting on current issues impacting ERISA plans, and includes administrative developments from IRS and other government agencies, cases, insights and FAQs.
- **ERISA Forms** offers access to more than 350 forms, including practical plan distribution forms, checklists, and practitioner letters in Microsoft® Word and Adobe® PDF formats. Forms in Word may be modified with your information and printed. It includes two sections containing more than 50 forms for 403(b) and 457(b) plans, new 2010 post-PPA terminating amendments for defined contribution plans and for 403(b) plans, and other forms updated for the latest IRS guidance.

Pension Educator Series

Pension Educator Series is a two-part series on qualified retirement plans. The series comprises 21 individual courses that explain everything from what a "qualified" plan is (and why an employer would sponsor one), to how to perform compliance tests. Both series include pre-test assessment tools, detailed text, glossary, real-world examples and scored quizzes.

Pension Elements is an introductory, seven course series, which presents general concepts to new plan recordkeepers, service personnel or sales representatives. Most students can complete this module in six to eight hours.

Pension Educator is a more advanced 14 course series designed for expereinced associates moving into an administrative or sonsulting role. This series also includes a comprehensive case study and places a special emphasis on current law (EGTRRA and PPA). Most students can complete this module in 14 to 16 hours.

More Online Learning Options

Individual learners may register online for either series for 24/7 access during a 60-day period. Plus, three new courses are available for purchase. These courses have been authored by our ERISA experts, incorporating the latest developments from recent legislation on the following plans.

- **Fundamentals of 403(b) plans** is an introductory course, which examines the different types of 403(b) plans and the requirements of each type of plan.
- **Fundamentals of 457 plans** is an introductory course, which examines the different types of 457 plans, the requirements and the tax consequences of the four types of 457 plans.
- **Fundamentals of equity-based compensation** is an introductory course, which discusses basic terms, requirements and tax consequences of the four types of equity-based compensation arrangements.

Firms needing one-time training for 25 or more employees should call us to discuss special arrangements. For larger firms seeing a long-term pension education solution, customized enterprise licenses are also available.

5500 Filing Guide

The 5500 Filling Guide is an up-to-date reference tool on required annual Form 5500 filings for pension and welfare benefit plans. The highly regarded, comprehensive EFAST 2 resource offers hundreds of FAQs with real answers to tough 5500 questions, helpful examples, actual samples of filings and more. Published in both hardcopy and electronic versions, the 5500 Filing Guide can help you prepare your 5500 filings confidently and correctly.

Stay Informed

For more information on Retirement Education, contact us at retirement.sales@fisglobal.com.