RETIREMENT EDUCATION THAT HELPS PENSION PROFESSIONALS STAY INFORMED

RETIREMENT | Retirement Education

FIS's Relius Education offers numerous educational tools and resources to help keep plan administrators and sponsors informed about relevant changes in the pension industry. You can learn at your own pace from a wide selection of conferences, live and private seminars, live and recorded web seminars, Pension Library periodicals, Pension Technical Updates, and ERISA resources.

Seminars and webinars

Relius Education's seminars include more than 125 pension education classroom-delivery seminars held annually in cities nationwide, live and recorded web seminars, and private on-site seminars. FIS's established ERISA attorneys, who have more than 97 years of combined experience, teach Relius Education courses, seminars, and conferences. Each Relius Education 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 Relius Education's instructor-experts. (Advanced preparation is not required to attend.)

For a complete list of current offerings, visit http://www.relius.net/products/seminarspension.aspx

Sample list of programs offered include:

- 401(k) Plan workshops
- Form 5500 workshops
- ERISA workshops
- Fundamentals of 401(k) and Other Qualified Plans
- Specialty topic workshops customized for private / onsite seminars

Features

- Hosts more than 125 pension educational classroom seminars per year
- Offers more than 50 live web seminars per year, most of which are eligible for SmartPass*
- Offers courses for plan administrators and plan sponsors
- Leverages multimedia-based instruction to effectively deliver concepts
- Includes access to on-demand library of archived web seminars
- Provides clear, consistent, and centralized messaging
- Reduces training investment by utilizing online resources
- Offers different levels so that you can choose the program that meets your needs and budget
- Accepted by most professional organizations for continuing education credit

Benefits

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- Allows you to review webinars at a convenient time that fits your schedule

Empowering the Financial World

Conferences

Relius 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 geared toward attorneys, actuaries, pension and compensation consultants, employee benefits and human resource professionals, CPAs, accountants, financial planners, mutual fund broker representatives, as well as agents and officers of insurance companies, bank trust officers and third-party administrators. Relius Education conferences are presented by nationally recognized employee benefit professionals.

Features

- Two Advanced Pension Conferences per year – and one Pensions on Peachtree Conference
- General and concurrent sessions on current pension topics
- No prerequisite nor advanced preparations required

Benefits

- Helps keep you up-to-date on industry developments
- Provides clear, consistent and centralized messaging
- Accepted by most professional organizations for continuing education credit

Pension Library

Available online, the Pension Library offers the value of four publications in one: ERISA Research Guide – Outlines & Answers, ERISA Newsletter, ERISA Current Developments and ERISA Forms. 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. To order or renew, visit http://www.relius.net/Products/PPDLibrary.aspx

Features

- **ERISA research** guide provides illustrative examples, interpretative notes on statutory provisions, practical hints on application of rules, warning on potential pitfalls of unanswered questions, and is available in outline form with accompanying FAQs
- **ERISA newsletter** delivers ERISA topics of current interest, comprehensive explanations, illustrative examples, and technical citations
- **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 format 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 plan amendments for defined contribution plans and for 403(b) plans, and other forms updated for the latest IRS guidance.

Benefits

- **ERISA research guide** reviews major substantive ERISA / qualified plan topic laws, and is updated semiannually 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
- Save research time with **ERISA current developments** which reports current issues impacting ERISA plans, including new rulings, notices and announcements from the IRS and other government agencies on a monthly basis
- **ERISA forms** offers access to more than 350 forms, including practical plan distribution forms, checklists and practitioner letters in Microsoft® Word and PDF formats. Forms in Word format may be modified with your information and printed. It includes two sections containing more than 50 forms for 403(b) and 457(b) plans, 2010 post-PPA terminating plan amendments for defined contribution plans and for 403-(9b) plans, and other forms updated for the latest IRS guidance.

Pension Educator Series

The centerpiece of Relius Education's self-paced online learning is the Pension Educator Series, 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 experienced associates moving into an administrative or consulting 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 403(b) Plans, 457 Plans and Equity-Based Compensation.

- **Fundamentals of 403(b) plans** is an introductory course to 403(b) plans. This course examines the different types of 403(b) plans and the requirements of each type of plan
- **Fundamentals of 457 plans** is an introductory course to Code 457 plans. This course discusses the different types of 457 plans, the requirements and the tax consequences of each of the types of 457 plans
- **Fundamentals of equity based compensation** is an introductory course to equity-based compensation plans. This course discusses basic terms, requirements and tax consequences of the four types of equity-based compensation arrangements. The advantages and disadvantages of each arrangement are also examined.

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

If you have any questions about enterprise licensing or training 25 or more employees, contact us for more information.

5500 Filing Guide

The 5500 Filing Guide is an up-to-date reference tool on required annual Form 5500 filings for pension and welfare benefit plans. This 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 fillings confidently and correctly.

Stay informed

Relius Education can help keep you current on important changes in the industry, and provide insights and answers to difficult questions regarding how to apply the latest developments to your practice. In addition, Relius Education continually adds topics, dates and locations to its popular programs.

To receive automatic email updates on industry developments and on the Relius Education offerings, subscribe to the free Relius Education pension technical updates and to the seminar newsletter at http://www.relius.net/login/Login.asp. After you have established a login, simply go to your user profile to subscribe to these informative resources.

About FIS's Wealth and Retirement administration

FIS provides wealth management and retirement technology and services that help banks, trust companies, brokerage firms, retirement plan administrators and advisors accelerate asset growth and optimize operations to achieve better outcomes for the end investor. We provide solutions for client acquisition and communication, transaction management, risk and compliance, portfolio accounting, plan administration and reporting that can be deployed as stand-alone products, part of a unified platform, or outsourced services.

Enabling the adaptive enterprise

Sitting at the intersection of technology and finance, FIS is focused on delivering fresh ideas and inventive solutions to help our customers adapt and thrive in an ever changing environment. With a blend of software solutions, cloud infrastructure, global service capabilities and deep domain expertise, FIS is capable of supporting virtually every type of financial organization, including the largest and most complex institutions in the world. For more information, please visit www.fisglobal.com