Assigning an Enrolled Actuary to Plan for reports that require certifications

- 1) Open the Sample DB plan*
- 2) Go to the Plans|Plan/Sponsor|Contacts screen and "Add" a contact

1 Plan / Sponsor	2 Provi	sions	3 Ass	umptions	Ϋ́	4 Misc	Ì	5 DB
Contacts Contact Names								Plan / Trust
						I		Dates
				<u>D</u> e	lete			Sponsor
								Contacts
								Advisors

3) Complete the contact information including Enrollment Number and click okay

Add/Edit Contact Name									
Last Name Actuary	First Name Enrolled	MI	Suffix	Salutation	🥅 Main Contact				
Address			Title	Nickr	ame				
			Industry Design	nations					
City	ST Zip	_							
	-		Enrollment Num	nber					
Phone () -	Extension		99-9999						
Fax	Extension		Email Address						
() •									
Notes									
				~					
Inactive Date					<u>0</u> k				
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4) The actuary will now be listed under the Contacts for the plan that you are currently in* as well as available under the Advisory tab for any plan.

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5) Highlight the actuary, select Type of Advisory as Enrolled Actuary and click on "Add"

	1 Plan / Sponsor	2 Provisions	ΞŤ.	3 Assumptions	ΞŤ.	4 Misc	- Ť	5 DB	
^	dvisors Possible Advisors Sample Plan Sponso Webinar Demo Plan:	r: Enrolled Actuary : me me		 Plan Advisor 	Plan A	dvisors			Plan / Trust
				C Company Advisor					Dates
(Type of Advisor Enrolled Actuary		Ţ	<< Remove					Sponsor
	Enrolled Actuary Sample Plan Sponso Phn: Fax:	ſ			,				Contacts Ad
]]				VISORS

Once you have the actuary setup and assigned as an advisor to the plan, the name and enrollment number will automatically print on reports requiring certifications.

*You may choose any plan to add a contact. However, any future changes such as updating the enrollment numbers or address changes will need to be changed in the plan that the contact was first entered. It is best to select a plan that can be kept track of. As a help, the plan that the contact was entered in, will precede the name of the contact.