BLAZE SSI® TECH Sheet

DC Match Calculator

The web-based **DC Match Calculator** complements any recordkeeping system by calculating and comparing the employer match allocations to the match by formula. Data entry is supported via a fully-validated MS Excel workbook. Supports comprehensive selection of match formulas and returns comparison of match by formula and year-to-date in worksheet columns and PDF-formatted reports.

1. APPLICATION FEATURES
+ Determines the employee match based on user-entered match criteria
+ Compares the formula match to year-to-date match
+ Supports matching contribution calculation with:
    Up to five levels with specified bend points as %pay or $Amt;
    Minimum and Maximum Plan Sponsor Match in $Amt or units;
    Years of service requirement;
+ Supports Safe Harbor Provision:
    Up to five levels with specified bend points as %pay or $Amt;
    SHP 'Carve out' and SHP 'Add to match';
+ Complements any recordkeeping system from any vendor on any platform
+ Calculation performed rapidly with results returned in MS Excel workbook for easy review

2. USER INTERFACE FEATURES
+ Easy and familiar, fully-validated MS Excel workbook for data entry
+ User Guide and on-line documentation
+ Automated data validation and input error trapping
+ Reports automatically prepared in .PDF file for view, print, archive and email

3. CUSTOMER SUPPORT
+ System kept up-to-date with applicable government regulations by BLAZE SSI
+ Basic and customized training available
+ Systems consulting and custom programming available
+ HelpLine support via email

4. OPERATING ENVIRONMENT SUPPORTED
+ MS supported Windows OS; Internet connection and Browser
+ MS Excel 2003+; MS .NET Framework 4.6.1
+ Web application maintained on secure BLAZE SSI web server
+ No BLAZE SSI software to install or update

DC Match.doc Rev 201901

DC Match Calculator

Complements any Record-keeping System Increase the accuracy of the employer match calculation and decrease dependence on undocumented worksheets with the BLAZE SSI DC Match Calculator. This module is not limited to any specific database or record-keeping system and can interface easily with any system or database. The DC Match Calculator supports comprehensive match criteria for up to five levels with specified bend points as a percent of pay or a dollar amount; minimum and maximum plan sponsor match in dollar amount or units; and a 'years of service' requirement. DC Match also supports a Safe Harbor Provision with up to five levels with specified bend points as a percent of pay or a dollar amount; and supports both a Safe Harbor Match with a 'carve out' and a Safe Harbor Match that is added to the employer match.

Fully-validated User-interface The DC Match Calculator requires minimal input using easy-to-understand Microsoft Excel plan- and census-level worksheets. The included worksheets are fully documented and validated for speed and accuracy. The system highlights any user-input errors which can be reviewed simultaneously with the input worksheet for quick correction by the user.

Adaptable to any Workflow The worksheet information can be input manually, copy/pasted from an external source or filled from a user-created query of the user's record-keeping system database. Calculated results can be emailed, entered into the record-keeping system and archived in a document retrieval system.

Accurate, Comprehensive Results The BLAZE SSI DC Match Calculator supports comprehensive matching formulas. Calculated results include census-level columns listing the plan sponsor match and the Safe Harbor match by formula; a comparison of the plan sponsor match to the Safe Harbor Match, a comparison of the plan sponsor match by formula to the year-to-date plan sponsor match and a comparison of the Safe Harbor match by formula to the year-to-date Safe Harbor match.

Results also include a client-ready, pdf-format document illustrating the user-entered matching provisions under the plan, a census-level report listing the matching contributions for each employee and a plan-level report with the match totals for the plan.

Easy System Deployment Since the system is maintained by BLAZE SSI on secure web-servers, the user's PC requires only an Internet connection, Browser and MS Excel 2003+. The system is always up-to-date with no maintenance updates to apply. User-input information and system results can be saved at the user selected location for convenience and security.

Pay only for Completed Results System costs are based on completed allocation calculations. There is no charge until the system determines the requested allocation. Users pay only for their actual use of the system, not for processing invalid user input.

Quality Professional Support from BLAZE SSI The DC Match Calculator is kept up-to-date by the BLAZE SSI staff. Using the DC Match Calculator will save you time and effort.