

PENDEAS

Quick Start Guide



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PENDEAS Quick Start Guide

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SAMPLE REPORTS:

View sample reports for PENDEAS and other BLAZE SSI qualified plan systems on-line at www.blazessi.com.

MORE INFORMATION:

The PENDEAS Quick Start Guide is intended for new users. More detailed information about PENDEAS is available in the PENDEAS Intro Guide and the BLAZE SSI Central Intro Guide. These guides are available to licensed PENDEAS users in the system Help Menu and are also on-line at www.blazessi.com.

Visit the BLAZE SSI website at www.blazessi.com to learn more about PENDEAS and other BLAZE SSI software products. Contact BLAZE SSI with your questions or to license PENDEAS:

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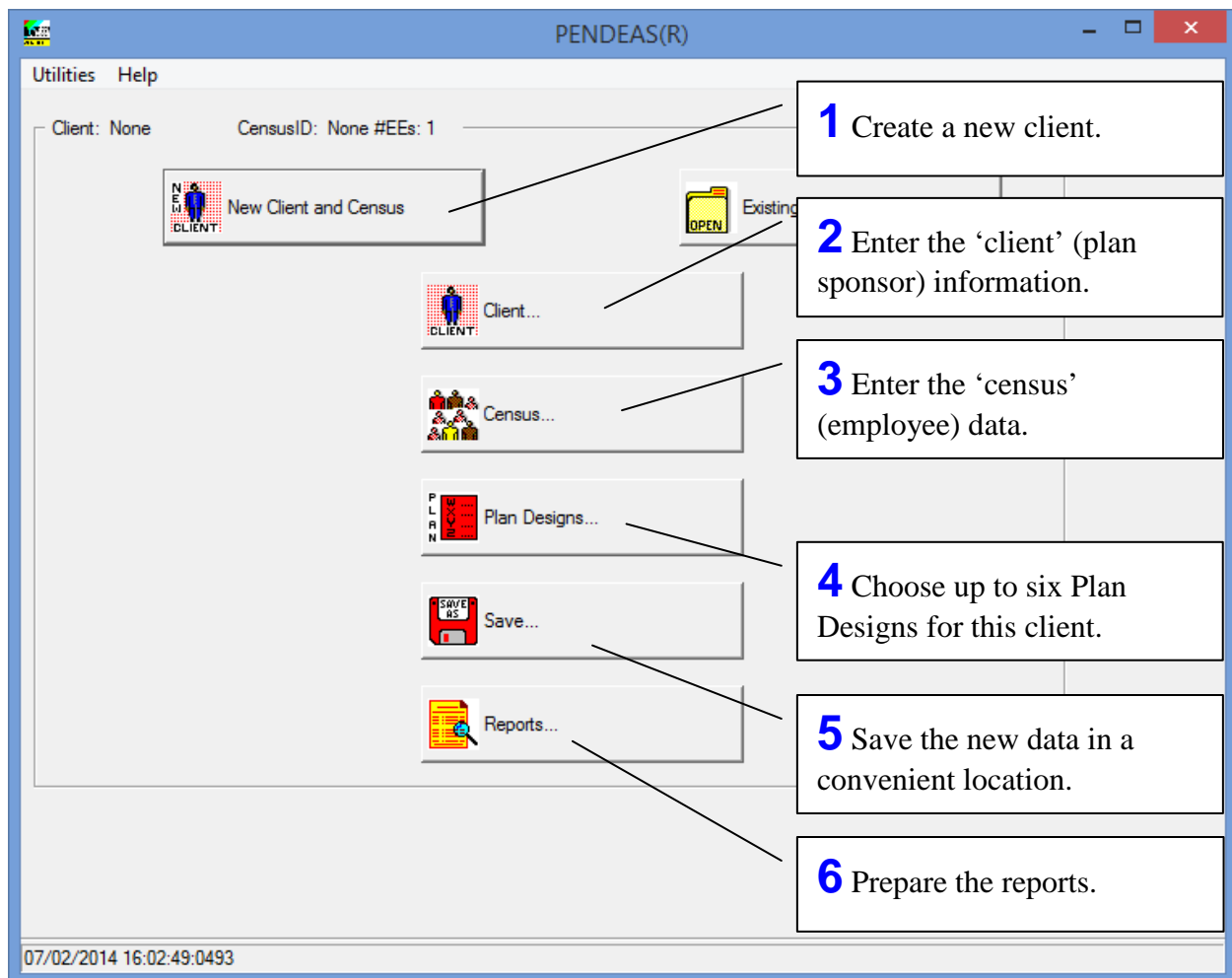
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The Main Form: PENDEAS Workflow

It's simple to prepare qualified plan designs – from the entry of the data to the completion of the finished illustration; it's just a few easy steps.

When you open PENDEAS you will see the 'Main Form' which presents buttons shown in the order of the suggested system workflow.

To begin, Click New Client and Census.



The screenshot displays the PENDEAS(R) software interface. The window title is "PENDEAS(R)". The menu bar includes "Utilities" and "Help". The main form shows "Client: None" and "CensusID: None #EEs: 1". The interface features several buttons with icons and labels, each corresponding to a step in the workflow:

- 1** Create a new client. (Points to the "New Client and Census" button)
- 2** Enter the 'client' (plan sponsor) information. (Points to the "Client..." button)
- 3** Enter the 'census' (employee) data. (Points to the "Census..." button)
- 4** Choose up to six Plan Designs for this client. (Points to the "Plan Designs..." button)
- 5** Save the new data in a convenient location. (Points to the "Save..." button)
- 6** Prepare the reports. (Points to the "Reports..." button)

The status bar at the bottom left shows the date and time: "07/02/2014 16:02:49:0493".

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Client: Enter Client Data

Click Client on the Main Form. Client data is divided into two tabbed sections: Basic Client Information and Cross Tested Multi-Group Allocations. Click the tab to switch from one section to the other. To simplify data entry the fields are well documented with 'tool tips' and context-sensitive 'help documentation,' which is available by using F1 or the Help menu at the top of the form.

When you complete the entry of the client data, click OK to return to the Main Form.

Click Help or F1 to see the context-sensitive Help Documentation.

Click the arrow to see additional options.

Hover over a field to see a tool tip for that field.

Click Cancel to return to the Main Form without applying changes.

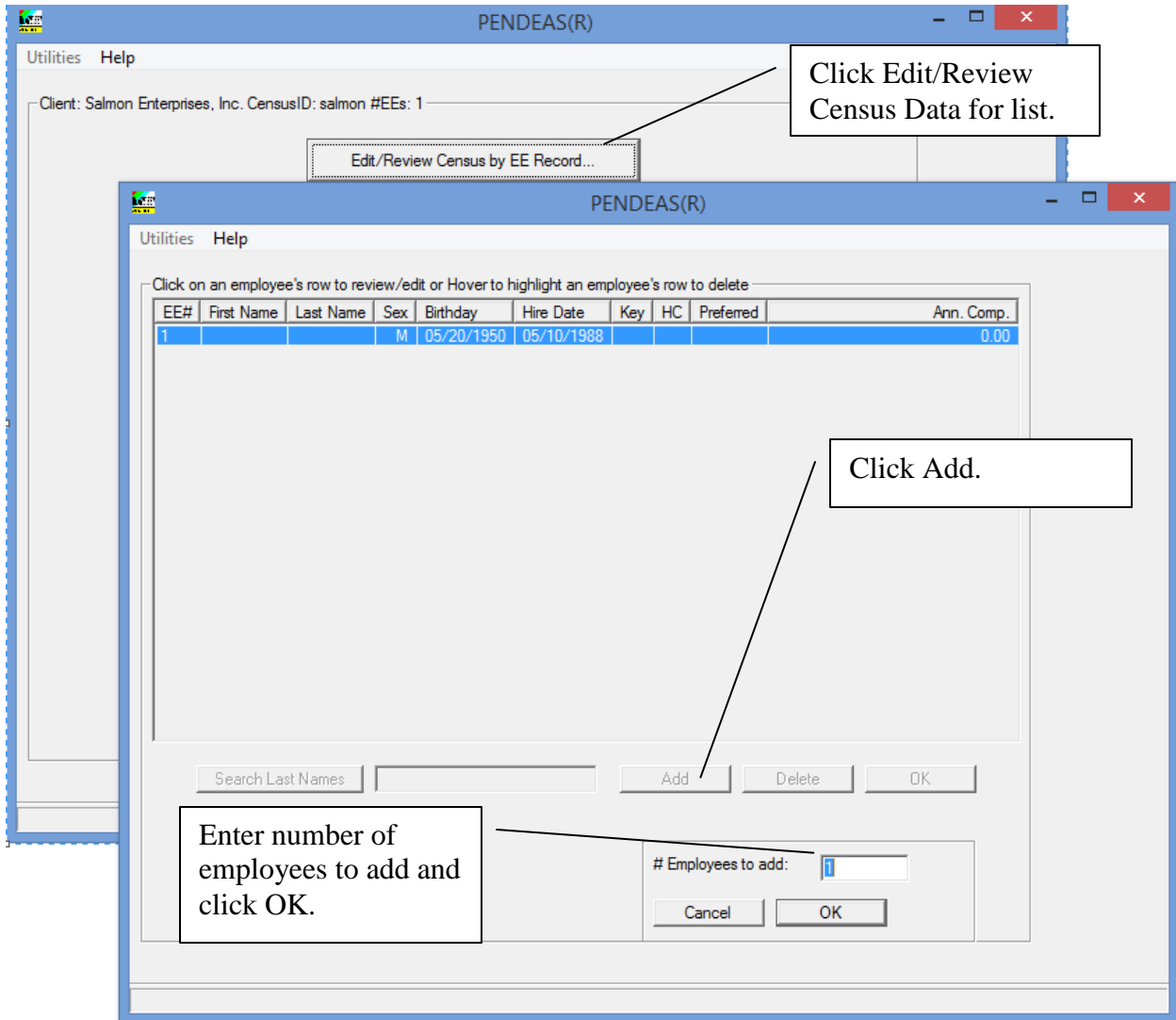
Click OK to apply changes and return to the Main Form.

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Census: Enter Census Data for a New Plan

Click Census on the Main Form. Click Edit/Review Census by EE Record to see a list of the employees. PENDEAS creates one 'default' employee record for a new illustration.

Click Add to enter the number of employees to add. Click OK and additional default employee records will be added to the list.



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Census (continued)

Additional employee records are now shown on the list. Click any employee to see the Basic Information for that employee. Use the Basic Information tab to enter employee data.

Use the Employee Status Determination tab if you want PENDEAS to determine the status. If the plan has no insurance or employee-level overrides then using these tabs is not necessary.

As an alternative to entering data on this form, see the PENDEAS Intro Guide Utilities: Import/Export for information about using MS Excel to import and export census data from PENDEAS.

Click OK to return to the prior form.

The screenshot displays the PENDEAS(R) application window. At the top, there is a menu bar with 'Utilities' and 'Help'. Below the menu bar is a table with columns: EE#, First Name, Last Name, Sex, Birthday, Hire Date, Key, HC, Preferred. The table contains five rows of data. A callout box points to the first row with the text: 'Click any employee row ...'. Below the table, a second window titled 'PENDEAS(R)' is open, showing the 'Basic Information' tab. This tab contains various input fields: Employee Id (1), Name (First and Last), Sex (Male/Female), Date of Birth (05.20.1950), Date of Hire (05.10.1988), Compensation Mode (Client-level mode: Annual), Compensation (0), Illustration Mode (Client-level mode: Annual), and Ownership Percent (0). There are also radio buttons for Preferred Employee (Not Preferred), IRC416 Key Status (Not Key), and Highly Compensated Status (Not H). At the bottom of this window are buttons for 'Restore Values of All Fields', 'Restore Value of Field with Focus', 'Select Employee' (with First, Prior, Next, Last sub-buttons), 'Cancel', and 'OK'. Callout boxes provide instructions: '... to see the Basic Information for the employee.' points to the 'Basic Information' tab; 'Enter employee ID, first and last name, compensation, etc.' points to the input fields; 'Select Employee' navigates to other employee records.' points to the 'Select Employee' buttons; and 'Click OK to apply changes and return to prior form.' points to the 'OK' button.

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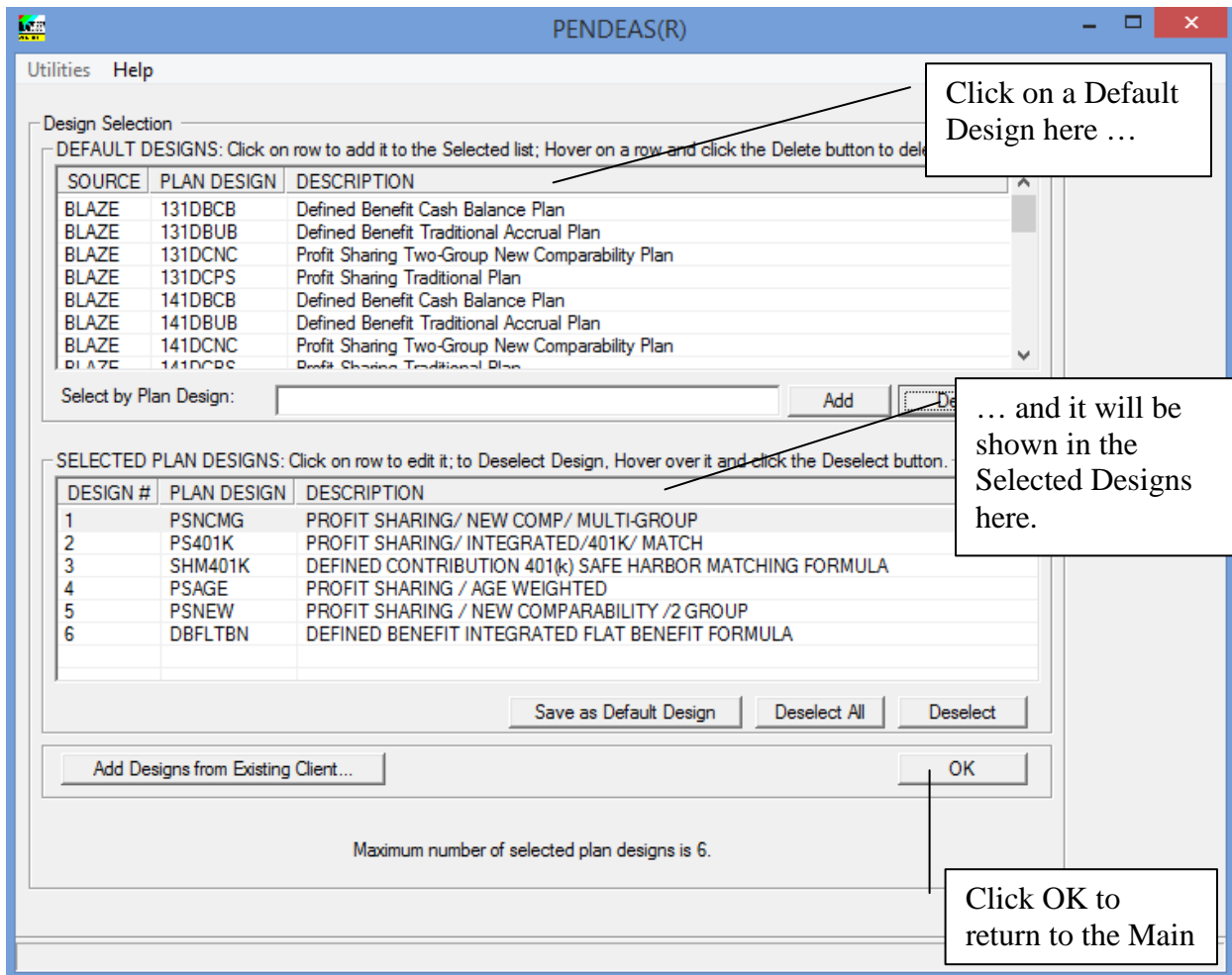
Plan Designs: Select Plan Designs to Illustrate

Click Plan Designs on the Main Form. Select up to six designs from the Default Designs list and they will be added to the Selected Plan Designs list.

All users receive BLAZE SSI Default Designs with PENDEAS. Users may create their own plan designs too. Plan designs are used with the census data to create the illustrations for the client.

The PENDEAS Intro Guide describes the editing of Plan Designs and other time-saving features of PENDEAS.

Click OK to return to the Main Form.



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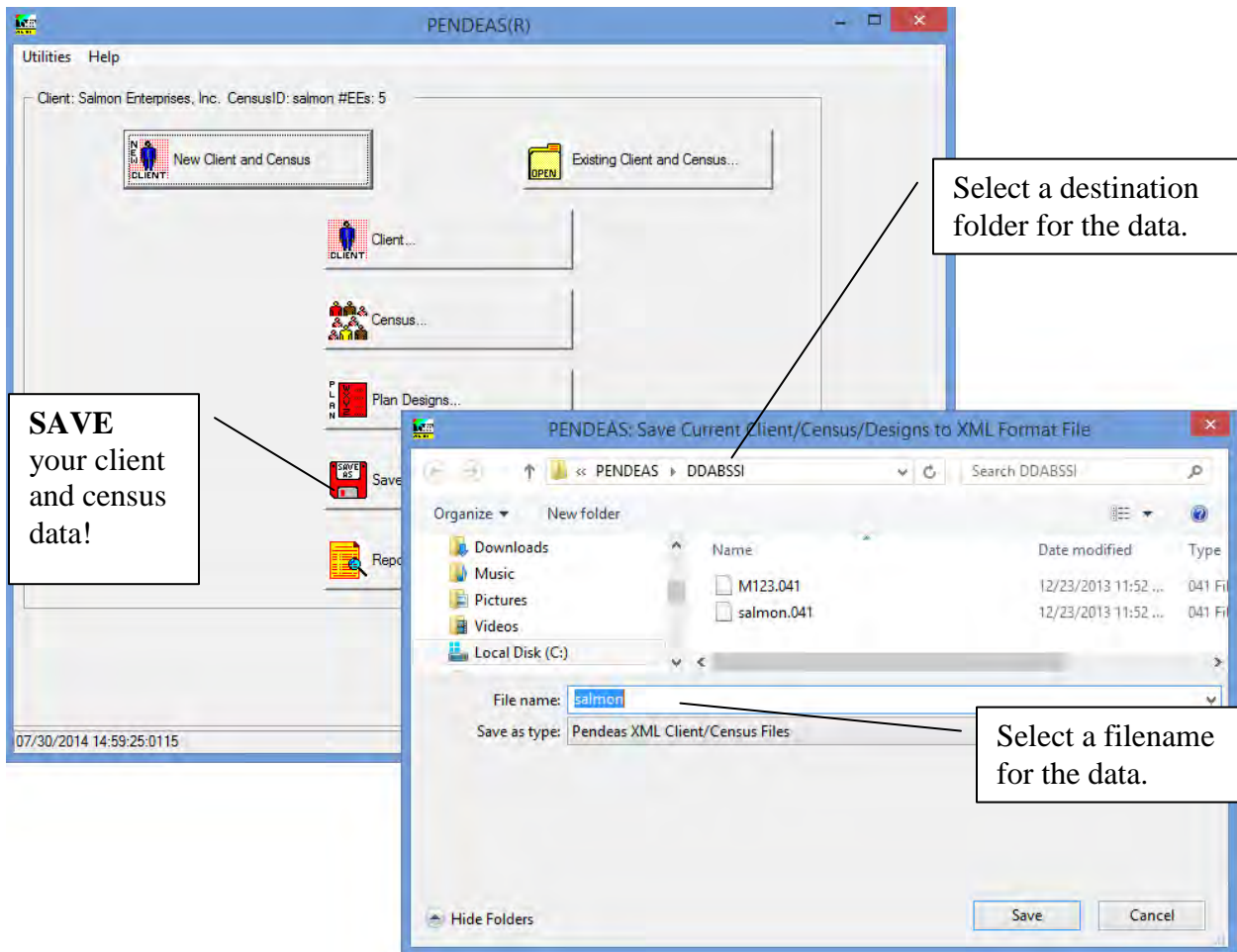
Save: Save Client and Census Data

Click **Save** on the **Main Form**. Once you have entered or edited the client and census data, you should save it. **If you close PENDEAS without saving your data, it will be lost. Save before closing (exiting) the system.**

You specify the location and filename for the stored client, census and associated design data that will be used to generate the illustration. The data can be saved to any location for which you have permission. It is not recommended that your data be stored in the \pendeas folder.

You may want to create a special folder to save this data.

Save the data before exiting the system! BLAZE SSI also strongly recommends saving data before printing reports or editing system preferences.



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Reports: Select and Prepare Reports

Click Reports on the Main Form. Once the data has been entered and saved, click Reports to select and prepare reports. Click a report title in the Available Reports list and it will appear in the Selected Reports list, indicating that this report will be included in the illustration.

When you click OK, PENDEAS will validate input, perform calculations and show the Post-Calculation Contribution Summary. There are many time-saving functions related to report selection; see the BLAZE SSI Central Intro Guide for more information.

Click View Reports to see the reports.

The image shows two overlapping windows from the PENDEAS(R) software. The top window displays the 'AVAILABLE REPORTS' list, and the bottom window displays the 'Post-Calculation Contribution Summary'.

AVAILABLE REPORTS: Click on a Report to Add It to the Selected List

Format #	Report Name
4	CC COST COMPARISON
5	CC BENEFIT COMPARISON
6	CC ACCUMULATION COMPARISON
7	CC PRE-RETIREMENT DEATH BENEFITS
8	CC AFTER TAX ANALYSIS
9	CC COMBINED PLAN
11	CC FACTFINDER - PLAN DESIGN DATA
112	CC FACTFINDER - CENSUS DATA

Enter a List of Format#s:

SELECTED REPORTS: Click on a Report to Remove It from the Selected List

Format #	Report Name
2	CC CLIENT & CENSUS DATA
1	CC COVER PAGE
15	
43	

PENDEAS: Post-Calculation Contribution Summary
Client: Salmon Enterprises, Inc.
CensusID: salmon #EEs: 5

	PSNCMG	PS401K	SHM401K	PSAGE	PSNEW	DBFLTBN
HC EEs	87,816	64,601	35,900	67,063	87,816	150,810
NHC EEs	12,181	13,707	9,200	11,625	12,181	16,224
All EEs	99,997	78,308	45,100	78,688	99,997	167,034
%To HC EEs	88%	82%	80%	85%	88%	90%

First Name	Last Name	HKP	PSNCMG	PS401K	SHM401K	PSAGE	PSNEW	DBFLTBN
ARCTIC	CHAR	HKP	52,000	52,000	27,900	52,000	52,000	130,356
ATLANTIC	SALMON	HKP						0,454
COHO	SALMON							0,189
CUTTHROAT	TROUT							1,197
RAINBOW	TROUT							4,238

Click View Reports to see the Selected Reports.

Click Cancel to return to the Main Form.

Design Id | Plan Design Description

PSNCMG	PROFIT SHARING / NEW COMP / MULTI-GROUP
PS401K	PROFIT SHARING / INTEGRATED / 401K / MATCH
SHM401K	DEFINED CONTRIBUTION 401(k) SAFE HARBOR MATCHING FORMULA
PSAGE	PROFIT SHARING / AGE WEIGHTED
PSNEW	PROFIT SHARING / NEW COMPARABILITY / 2 GROUP
DBFLTBN	DEFINED BENEFIT INTEGRATED FLAT BENEFIT FORMULA

HC EEs Key EEs Preferred EEs

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Reports (continued)

Click View Reports on the Post-Calculation Contribution Summary. Use the Pre-print Questions form to make customizations to the reports, otherwise click OK.

An independent browser window opens to show the selected reports. Page through the pdf-format reports to see the full illustration. The reports may be saved, printed or emailed directly from this window.

The preparation of the illustration is complete.

The screenshot displays the PENDEAS(R) application window with a list of available reports and a preview window. The available reports list includes:

Format #	Report Name
4	CC COST COMPARISON
5	CC BENEFIT COM
6	CC ACCUMULATI
7	CC PRE-RETIREM
8	CC AFTER TAX A
9	CC COMBINED PL
11	CC FACTFINDER
12	CC FACTFINDER

The preview window shows a PDF report titled "QUALIFIED PLAN DESIGN FOR Salmon Enterprises, Inc." prepared by BLAZE SSI on 07/29/2014. The preview window includes navigation controls at the bottom: a page indicator showing "1 / 4", a back button, a forward button, a search icon, and a print icon.

Callouts provide the following instructions:

- Click on any report to view the available customizations, otherwise click OK.
- Reports are shown in an independent browser window.
- Email reports directly from this window.
- Print reports directly from this window.
- Save reports directly from this window.
- Use these controls to see the other pages in the illustration.