

PPA Restatement Comparison Chart

PPA Restatement Fees	Accudraft	ASCI	Corbel Relius	Datair	Erisafile	FT William	McKay-Hochman
Up-front fee charged to cover filing fee with the IRS per type of document					\$2,500		
If the up-front fee is less than the actual IRS filing fee, what support is provided for complying with the 408(b)(2) fee disclosure regs. for receiving indirect compensation over the 6-year life of the document? (Filing fee is \$21,000 per type of document divided by required 30 word-for-word adopters. Money purchase plans are \$21,000 per type of document divided by required 10 word-for-word adopters.)					NA – up-front filing fee covers entire IRS filing fee		
When must up-front fee be paid?					Due when Form 4461 is signed.		
Is there a deadline for making a decision?					Jan. 23, 2012		
Annual subscription fee for creating prototype and volume submitter plan documents							
Annual subscription fee charged to word-for-word adopters of PPA restatements (Form 4461 filed with IRS by Jan. 31, 2012 deadline)					\$2,950		
Annual subscription fee charged to all other firms					\$5,500		
How many documents per year does annual subscription fee include?					500		
Is annual fee guaranteed not to increase for 6-year life of document or until the next restatement cycle?					Yes		
Does annual fee for word-for-word adopters include ability to create individually designed documents (cash balance, ESOP/KSOP, DBK, 409A, 457(b))					Yes		
What is the annual registration fee?					\$495		
Does annual registration fee include free continuing education and seminars for all members of firm, and do all free seminars provide ERPA CPE credit?					Yes		
Does annual registration fee include free unlimited support providing answers to questions about compliance and administration of documents?					Yes		
How quickly are questions answered?					24 hrs		
What is the education level and experience of the support staff answering those questions?					ERISA attorneys avg 15+ years of experience		