

# Advisor Roadmap: Delivering the Benefits of OnePersonPlus®

## STEP 1 Getting Started

- Create proposal online at [Dedicated-DB.com](https://www.dedicated-db.com) illustrating maximum contribution and tax-savings or call Dedicated DB plan consultants for a custom proposal at 866-269-2706
- Present illustration to client

## STEP 2 Open a Defined Benefit Plan

- Complete Plan Design Questionnaire providing detailed business/income profile with client and CPA
- Client signs completed Plan Design Questionnaire and sends Plan Design and Document Preparation Fee to Dedicated DB

## STEP 3 Plan Design and Installation

- Dedicated DB will:
  - Design Plan
  - Obtain Trust ID
  - Prepare Adoption Agreement & other plan documents
  - Send Welcome Kit with documents to Advisor and/or client for client signature

## STEP 4 Open and Fund the Investment Account

Once Adoption Agreement is signed, complete Investment Account Application using the Trust ID and instructions from Dedicated DB.

- Client sign Account Application
- Help your client select investments
- Client may contribute up to 50% of the proposal's estimated contribution amount prior to year end
- Full contribution is due by tax filing deadline plus extensions, but no later than 8 1/2 months after the plan year end

## STEP 5 Annual Review and Reporting

At year end Dedicated DB requests information from Client on business status and a copy of fiscal year end investment account statement

- Client sends completed information to Dedicated DB
- Dedicated DB performs actuarial calculation to determine the allowable contribution range for that year and informs Advisor and Client by letter of final contribution amount
- Client informs Dedicated DB when remainder of contribution is funded
- Dedicated DB prepares 5500, other tax forms and submits to the IRS