Advisor Roadmap: Delivering the Benefits of OnePersonPlus®

Dedicated DB
Part of FUTUREPLAN by ASCENSUS.

STEP 1 Getting Started

- Create proposal online at 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 8½ 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 acturial 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

© Copyright 2026 Dedicated Defined Benefit Services, part of FuturePlan by Ascensus.
All rights reserved. OnePersonPlus is a registered trademark of Dedicated Defined Benefit Services.