

# Proposal Specifications

12/11/2024 8:38 am CST

Enter the specifications for each proposal. If only two options are to be presented under the 'General Information' box, the responses to the third option will be inactivated.

You may import specifications from either the Plan Document System (if purchased) or the Administration System (if purchased) into the first option. See the links just above the "Proposal 1" heading.

Note that safe harbor nonelective contribution percentages are located at the bottom of the "Safe Harbor Allocations" section (and not under "Profit Sharing").

**Note regarding matching formulas:** To enter a safe harbor match with additional non-safe harbor match, you will need to enter information in both the "Safe Harbor Allocations" and "Non Safe Harbor Allocations" sections.

To enter a traditional safe harbor formula:

- Number of Safe Harbor Matching rates: **2 rates**
- Enter rate of Matching Contributions on first tier (without % sign): **100**
- Enter maximum amount of Employee Contributions matched on first tier (without % sign): **3**
- If two tiers, enter rate of Matching Contributions on second tier (without % sign) If one tier, enter zero: **50**
- If two tiers enter maximum amount of Employee Contributions matched on second tier (without % sign): **5**

Additional non-safe harbor tiers can be entered under the "Non Safe Harbor Allocations" section. Tiers will be added on top of any safe harbor tiers entered above (for example if you have a traditional safe harbor match and enter an additional tier of 50% up to 6% of compensation, the additional tier will only affect contributions above 5% of compensation - up to 6%).

**Proposal Specifications**

[Import Document](#)

[Import Admin](#)

Enter description of proposal option:

**Contribution Sources**

Elective Deferrals:

Yes ▾

Yes ▾

Yes ▾

Safe harbor type:

Yes - SH Nonelective ▾

Yes - SH Match ▾

No ▾

Matching Contributions:

Yes ▾

Yes ▾

Yes ▾

Profit Sharing Contributions:

Yes ▾

Yes ▾

Yes ▾

**Safe Harbor Allocations**

Number of Safe Harbor Matching rates:

1 rate ▾

2 rates ▾

1 rate ▾

Enter rate of Matching Contributions on first tier (without % sign):

0.00

100.00

0.00

Enter maximum amount of Employee Contributions matched on first tier (without % sign)

0.00

3.00

0.00

If two tiers, enter rate of Matching Contributions on second tier (without % sign) If one tier, enter zero:

0.00

50.00

0.00

If two tiers enter maximum amount of Employee Contributions matched on second tier (without % sign):

0.00

5.00

0.00

Nonelective Safe Harbor contribution:

0.00

0.00

0.00

**Non Safe Harbor Matching Allocations**

Matching Contribution formula (if SH Match, enter number of added Tiers):

1 rate ▾

1 rate ▾

1 rate ▾

Enter rate of Matching Contributions on first tier:

0.00

100.00

0.00

Enter maximum amount of Employee Contributions matched on first tier:

0.00

6.00

0.00

If two tiers, enter rate of Matching Contributions on second tier:

0.00

0.00

0.00

If two tiers enter maximum amount of Employee Contributions matched on second tier:

0.00

0.00

0.00

**Profit Sharing Contribution**

**Profit Sharing Formula**

Profit Sharing allocation formula:

Pro rata ▾

Pro rata ▾

New Comparability ▾

Allocation type for types other than New Comparability:

Specified ▾

Specified ▾

Dollar ▾

**Profit Sharing - Integration**

If "Integrated", integration level for determining Excess Compensation:

TWB ▾

TWB ▾

TWB ▾

If "Integrated", enter fixed percentage or fixed dollar amount (without % or \$ or commas):

0.00

0.00

0.00

**Profit Sharing - Allocation Amounts**

If allocation type is "Dollar" enter total dollar:

0.00

0.00

20000

If allocation type is "Specified" enter percent

3

0.00

0.00

If allocation type is "Specified" and integrated, enter amount of permitted disparity (max 5.7% or other lower applicable rate) :

0.00

0.00

0.00