

MINCAL™ Software

Minimum Distribution Software

Calculating required minimum distributions (RMDs) is one of the most complex aspects of IRA administration. CWF has developed MINCAL™, a Windows® based software package to perform the necessary calculations.

This innovative software will enable you to do the following:

- Help you to provide excellent customer service and stay in compliance
- Prepare RMD Notices
- Calculate your customer's Required Minimum Distribution (RMD)
- Calculate and monitor RMDs for inherited traditional IRAs
- Calculate and monitor RMDs for inherited Roth IRAs
- Prepare annual withholding reminder notices
- Increase employee productivity
- Exchange data between PC and mainframe via an optional upload/download feature
- Maintain an unlimited number of beneficiaries per IRA
- Maintain an unlimited number of instruments per IRA
- Generate administrative reports
- Generate all current and future IRS required RMD data

Data Transfers Easily

MINCAL™ has the ability, through its unique download feature, to transfer customer, investment and beneficiary data from virtually any mainframe Host computer to the personal computer on which MINCAL™ is being used. This download feature is separately priced on a quotation basis.

Asset Size	Annual Fee
100 million or less	\$149
250 million or less	\$249
500 million or less	\$399
Greater than 500 million	\$649

Please complete this form and email to info@pension-specialists.com or call for more information at 1-800-346-3961



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- Yes! I am interested in being contacted to discuss the possibility of purchasing a license to use CWF's MINCAL™ software so that I can effectively and efficiently administer 70½ IRAs and inherited IRAs.**

Name _____ Title _____
Institution/Organization _____ Phone _____
Address _____ Fax _____
City/State/Zip _____
e-mail _____

Telephone: 1-800-346-3961 FAX: 1-800-211-0760 www.pension-specialists.com e-mail: info@pension-specialists.com