



GENERAL BULLETIN

CONNECTICUT
BANKERS
ASSOCIATION
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SENT TO:

2010 - 83

May 5, 2010

TO THE CHIEF EXECUTIVE OFFICER
OR INDIVIDUAL ADDRESSED

CEO, CEO+,
Retirement Plans

RE: Ascensus Endorsement

We are pleased to remind members of our endorsement of Ascensus, Inc. to provide retirement plans products and services to our member banks. Specifically, the following fees and discounts will apply to CBA member banks:

- 1) **IRA, SEP, SIMPLE, Coverdell Education Savings Accounts, Health Savings Accounts and Qualified Plan Forms, Brochures and Documentation (printed format)**
 - a) CBA members will receive a ten percent (10%) discount off the retail price for all forms and brochures.
- 2) **IRA, SEP, SIMPLE, Coverdell Education Savings Accounts and Qualified Plan Forms, Brochures and Documentation (electronic format)**
 - a) CBA members will receive a discount of ten percent (10%) off the retail enrollment fee.
- 3) **Qualified Plan, SIMPLE and Simplified Employee Pension Plan Prototypes**
 - a) CBA members will receive a discount of ten percent (10%) off the retail enrollment fee.
- 4) **1-800 IRA, SEP, SIMPLE, Coverdell Education Savings Accounts, Health Savings Accounts and Defined Contribution Plan Consulting Services**
 - a) CBA members will receive a discount of ten percent (10%) off the retail annual fee.
- 5) **IRA, SEP, SIMPLE, Coverdell Education Savings Accounts, Health Savings Accounts and Qualified Plan Publications (printed and Internet formats)**
 - a) CBA members will receive a ten percent (10%) discount off the retail price for all publications.
- 6) **Commercial Software Products (inclusive of electronic-based learning modules)**
 - a) CBA members will receive a discount of ten percent (10%) off the retail enrollment fee.
- 7) **IRA, SEP and SIMPLE Administration Annual Base Fees (data processing services)**
 - a) CBA members will receive a discount of \$0.50 per account off the retail IRA annual per account fee.
 - b) CBA members will receive a discount of ten percent (10%) off the retail Qualified Plan annual fee.

Should you have any questions or would like to request additional information, please contact Heather Hoskins at Ascensus at (800) 346-3860 ext. 55364 or heather.hoskins@ascensus.com. As a thank you to CBA members from Ascensus, mention this General Bulletin when visiting with Heather Hoskins and receive your free HSA Desktop Guide, a \$22.00 value!

Sincerely,

COLLEEN E. CLANCY
Vice President