Brentmark, Inc.


**(RDP) Retirement Distributions Planner** (Desktop) version 2021.00 has been released and is available for download in your Portal Dashboard.

Please **Submit A Support Ticket** with any additional questions.

## Release Notes:

*Version 2021.00 (Released 3/10/2021)*

**§1.401(a)(9) table has been updated to reflect the changes for 2022+.**

- This update includes the redetermination calculation for non-spousal beneficiaries during the transition time.
- If they are inheritors in 2021 or before - it will recalculate in 2022.

**When the spouse is *not* the beneficiary located on the main screen**.

- The non-spousal beneficiary's birthdate on the "Beneficiary Information" screen was not linking to the beneficiary date on the main screen.

**Distributions set to the end of the year from the Options menu.**

- For the ten-year rule (non-spouse beneficiaries with the SECURE Act), this caused the 11th year to show a balance, which was the growth.
- Amortize for the 10-year rule. If the distributions are set to the end of the year, it now considers the year's growth in this calculation instead of a larger distribution in year 10.

**The option to choose between Lump Sum and Amortization for the ten-year rule is located on the "Beneficiary Information" window.**

- Whenever the non-spousal beneficiary panel (with the name, percentage, birth date, disabled, etc.) inputs were not visible, the option did not show.
- This option has been removed from that panel and now will show all the time.

**When an input changes, a message has been added to let the user know the results are not current until the user presses enter (or clicks the button which will recalculate).**