Brentmark, Inc.

(RPA) Retirement Plan Analyzer (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 3/26/2021)

- **§1.401(a)(9) Table:** This table has been updated to reflect the changes for 2022+. This 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).
- **Income Tax Adjustments** for 2021 are now included.
- **Estate Tax Adjustments** for 2021 have also been included.
- **View Reports and Graphs Window: T**he Recommended Reports have been updated to include several commonly used reports.
- **Print Window:** The tab selection now includes the Recommended Reports tab, which displays the same report suggestions from the View Reports and Graphs window.
- **Case Analyzer Window:** The beneficiary information only contained the Birth Year for each beneficiary. It now matches the same input structure (full birthdate) in the Client Inputs section of the program.
- **Quick Client Input Screen:** Using the "Edit" menu to enter "Client Information" only contained the Birth Year for each beneficiary. It now matches the same input structure (full birthdate) that appears in the Client Inputs section of the program.
- **Net Distributions Presentation Report:** There was an issue if the number of years of the analysis resulted in a final year for which the 10-year rule (SECURE Act) had not completed. A workaround was to use the computed number of years instead of manually entering the number of years. This issue only impacted this report.
- **UI/UX Experience**: Several minor cosmetic changes were made to the program to enhance the user experience (boldness, font consistency, etc.).

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