

INTERNSHIP AFFILIATION REPORT ON Activities at ERISA Department of Datapath Limited

MD RAKIBUL ISLAM

This report is submitted to the school of Business and Economics, United International University as a partial requirement for the degree fulfillment of Bachelor of Business Administration.

INTERNSHIP AFFILIATION REPORT ON Activities at ERISA Department of Datapath Limited

Submitted To:

AHMED IMRAN KABIR

Adjunct Faculty

Submitted By:

MD Rakibul Islam

111 161 366

Management Information System (MIS)



School of Business and Economics

United International University

Date of submission

12 April, 2021.

datapath

Letter of Transmittal

Date: 12 April, 2021.

Ahmed Imran Kabir
Adjunct Faculty
School of Business & Economics
United International University

Subject: Submission of Internship Report on “Activities at ERISA Department of Datapath Limited”

Dear Sir,

It is a great pleasure to present the internship report titled **Activities at ERISA Department of Datapath Limited**” which was assigned to me as a partial requirement for the completion of Bachelor of Business Administration degree.

It is my honor to work for a leading organization of Bangladesh and gain an in-depth knowledge on lending process and monitoring techniques. Throughout the study, I have tried with the best of my capacity to accommodate as much information and relevant issues as possible and tried to follow the instructions as you have suggested. I tried my best to make this report as much informative as possible.

I am grateful to you for your guidance and kind cooperation at every step of my endeavor on this report. I shall remain deeply grateful if you kindly take some pen to go through the report and evaluate my performance.

Sincerely yours-

Md Rakibul Islam
ID: 111 161 366
School of Business and Economics
United International University

Letter of Endorsement

The Internship Affiliation Report entitled **Activity at ERISA Department of Datapath Limited** has been submitted to the Office of Placement & Alumni, in partial fulfillment of the requirements for the degree of Bachelor of Business Administration (BBA), Major in Management Information System (MIS), Faculty of Business Administration on April 12, 2021 By **Md Rakibul Islam**, ID: **111 161 366**. The report has been accepted and may be presented to the Internship Defense Committee for evaluation.

(Any opinions, suggestions made in this report are entirely that of the author of the report. The University does not condone nor reject any of these opinions or suggestions).

Ahmed Imran Kabir
Internship Supervisor

Acknowledgement

I might want to take a minute to thank my respectable faculty **Ahmed Imran Kabir**, for giving the extension to finish my temporary position program with his important direction, consolation, and thoughtful counsel all through my internship. I might want to communicate my deepest gratefulness to all the individuals from Datapath Ltd. who caused me in finishing the report. I might want to thank all my colleagues for their help all through my internship period.

The report title as named **Activity at ERISA Department of Datapath Limited** has been prepared to fulfil the requirements of BBA degree. I am very much fortunate that I have received utmost and sincere guidance, supervision and co-operation from various people while preparing this report.

I might want to devote most extreme gratitude to the ERISA office chief **Taifur Rahman** and HR supervisor **KH. Fazle Rabbi** of Data Path Ltd for directing me and giving all vital data expected to set up my internship report. I additionally need to communicate unique gratitude to the senior Executive of ERISA office **Nazia Nasir Nipa, Gufran Siddique, Reeha kazi, Shabab Chowdhury** who has given me all the preparation required.

I would like to convey my sincere appreciation and thanks to United International University and all the members of Datapath who gave their best in helping me learn and do my internship report and for giving me such opportunity where I got to learn so much about retirement plan benefits. I hope my report will show a clear picture of American retirement plan industries.

Executive Summary

During the last semester of Bachelor of Business Administration (BBA) program, I have done my temporary job at DataPath Ltd. to have a commonsense presentation. The subject of my internship report is **"Activities at ERISA Department of Datapath Limited."**

In the beginning part, I have mentioned some sub-parts-method of reasoning where I have explained the significance and explanations for undertaking this report destination where I have expressed the motivations behind the report and foundation where I have examined about the depiction and history of the organization. The USA government always try to make sure their people secure retired life. If a participant follows the IRS & DOL rules and regulation and maintain a retirement plan it helps them to reduce Tax of their organization's income profit. So, organization outsources the activity to a third-party organization which is also known as third party administrator. DataPath is an outsourcing company which processes the activities of a retirement plan.

I have done preparing Cycle 3 Restatement plan, Amendment, Checking Enrollment kit, Tagging the plan document and many other activities. I have additionally done some other important exercises like checking records, Project plan document print and reports. I faced some difficulties that I have watched and recognized, for example- server issues etc. During these four months of internship, I have learned a lot about the practical activities of the US retirement plan industry.

Table of Contents

Letter of Transmittal	iv
Letter of Endorsement	v
Acknowledgement	vi
Executive Summary.....	vii
CHAPTER I: Introduction	2
Background	2
Objectives	2
Scope of the Report	3
Area and Time:	3
Area:.....	3
Time:	3
Methodology.....	4
Limitations of the Report	4
Company History.....	6
Vision.....	7
Mission.....	7
Service	7
Logo.....	7
Organizational Structure	8
Other Departmental Structure.....	8
Strategic SWOT Analysis	9
Service Analysis:.....	11
Services	11
Retirement Plan Design	11
Setup:	11
Retirement Plan Documents.....	11
Retirement Plan Setup & Pre-Conversion:.....	12
Retirement Plan Administration:	12
Compliance Testing.....	12
Tax Compliance:	12
Recordkeeping	13
Participant Services:.....	13
Investment Advice:	13

ERISA Consulting/ Plan Documents Department.....	15
Cycle 3 & PPA Restatement:	15
Document Tagging:	15
Plan Amendment:	16
Enrollment Kits:.....	16
F8822b Form:	16
Lesson Learnt from the Organization	16
Knowledge about the US Retirement Plan industry	16
Some high valuable Software:	17
More proficiency in Microsoft Excel	18
Improved personal skills / decision making.....	18
A greater sense of professionalism.....	18
Time management and priority setting	19
Success comes through great work	19
Conclusion.....	21
Proposed Improvement Plan	22
References	24
Appendix	25
List of Abbreviation	25
Internship Progress Report	26

CHAPTER 1: INTRODUCTION



CHAPTER I: Introduction

Background

For all Bachelor of Business Administration (BBA) students Internship program or Project paper is a graduation requirement. Internship is a program where a student can work in an organization to gain real life knowledge of corporate world, working experience and appreciable working skills. So that I select an Internship program to complete my BBA program. Only classroom study cannot make a student perfect to handle real life working. Through internship students can understand the environment of organization. Because only theoretical knowledge is not enough for professional life. For gathering the practical knowledge, I joined in business world as an intern in DataPath on October 01, 2020. It was four months long internship program. I was officially appointed to work in ERISA (Employee Retirement Income Security Act) Department. This report is basically on the overall activities in ERISA department of DataPath Ltd. This report shows the historical background of the company, its different products and services of the company, findings and recommendations based on the experience gathered.

Objectives

The main objective of this report is to gain an idea about the American retirement benefit plan and gather insight about the rules, regulations, and procedures regarding the retirement benefit plan. Gain experience in the Bangladeshi corporate world and gain knowledge by completing this affiliation report. I can relate my academic preparation with the work I have done at the organization as well.

The overall objectives of this report are:

- To understand the retirement industry of the USA.
- To acquire a clear knowledge about all the division and departments of Data Path Ltd.
- To know the practical work on the “ERISA” of the Retirement plan.
- To get the detail idea of about Relius, DGEM, Unify and other software and websites related to the retirement plan.

- To apply theoretical knowledge in the practical field.
- To achieve the practical knowledge of corporate strategy.
- The problems involved in training new employees.
- Ways to solve those problems.

Scope of the Report

This paper is over the ERISA (Employee Retirement Income Security Act) department of Datapath Ltd. New-Business sector of Datapath basically cover preparing a new plan for retirement policy, modify the plan according to client demand, support to July Business service by the plan where ERISA sector justify the plan document according with USA retirement law rules and regulation and saved it database sector. This data and related information are collected from various sources for preparing this report. Discussed with the employees of the Datapath, collect their operation manual. While preparing this report, learnt so many matters related to USA 401(K) industry and its activity. It helped to enrich my knowledge about USA 401 (K) industry, retirement policy and also Some highly valuable Database & processing software as well IT skills.

Area and Time:

Area: Datapath is a BPO based Organization. It's BPO target market focus on USA 401(k) industry. So, this report area covers USA retirement Industry, and its enrollment kit, and the way of working these things in ERISA department.

It also covers the huge number of plan database management of Datapath, using several types of server based online software which plays a big role for me. It relates my academic major department Management Information System (MIS).

Time: I joined in business world as an intern in Data-Path on October 01, 2020. It was four months long internship program. I was officially appointed to work in ERISA department.

Methodology

Methodology represents the accuracy level of main objectives of any study. So that, I have used both qualitative and quantitative information to give it a clear judgement opportunity. I used two major sources of information in this report.

Primary Sources:

- Practical work involvement.
- Through perception.
- Adviser design outline poll.
- By Email.
- Plan Design survey.

Secondary Sources:

- July Business Service.
- DataPath Employee Book.
- company Yearly reports.

Limitations of the Report

In the period of this report, I found so many obstacles and it was very hard to overcome it. But finally, I could manage myself. The Limitations are-

- It was really hard to understand the Retirement policy of USA.
- Completely new industry for me.
- Lack of Information about this industry.
- High level Software Training.
- Office Hour maintain.
- Completely new environment for me.
- Communication.

There are many more limitation that I faced to complete this report that I cannot explain properly. But by the grace of Almighty and with help of my course instructor I am able to overcome all of this.

CHAPTER 2: COMPANY ANALYSIS



Company History

The name of the company I completed my internship is Data-path Limited. It is an outsourcing company in Bangladesh. It is working for July Business Service which is owned by Jim Hudson and John Humphrey. July Business Services plays a renowned retirement plan industry in U.S.A. In 2005, Datapath started the operation for July Business services on a trail base. At the beginning it was providing supportive operations for July. In 2008 it officially Started work for July Business Services. The company hired the efficient employees to work for the July Services. In the beginning time it had not more than 10 employees. But now more than 230 people are working for this company with their brilliant appreciation. July Business Service is working as a Professional Service firm for their client and focused on the USA 401(k) retirement industry and related all other administrative services. It plays an important role to work very closely with the employer and financial partner for customized services. It also helps to meet the organization goal. This company has a great experience in this industry.

The firm's worked with so many relationships, such as Bank, investment advisors, mutual fund company, brokerage firms. In the end of 1996, this company had only 5 employee and 250 retirement plans.

	
Company Name	DataPath Limited
Year of establishment	January, 2008
Address	Ambon Complex, Floor- 8 th – 9 th , 99 Mohakhali C/A, Dhaka-1212, Dhaka.
Company Website	www.data-path.net
Organization's Head in Bangladesh	Mr. Ashfaqur Rahman Designation: Managing Director
Legal Structure of the Company	Private Limited
Table: 1.1	

Vision

"Become the best retirement plan administrator in USA".

Mission

Is to provide financial advisors and plan sponsors the power to choose the retirement plan solution that best meets the goals of business owners and their employees by delivering refreshingly responsive, unbiased, reliable plan design, administration, recordkeeping, and consulting that encourages saving for retirement.

Service

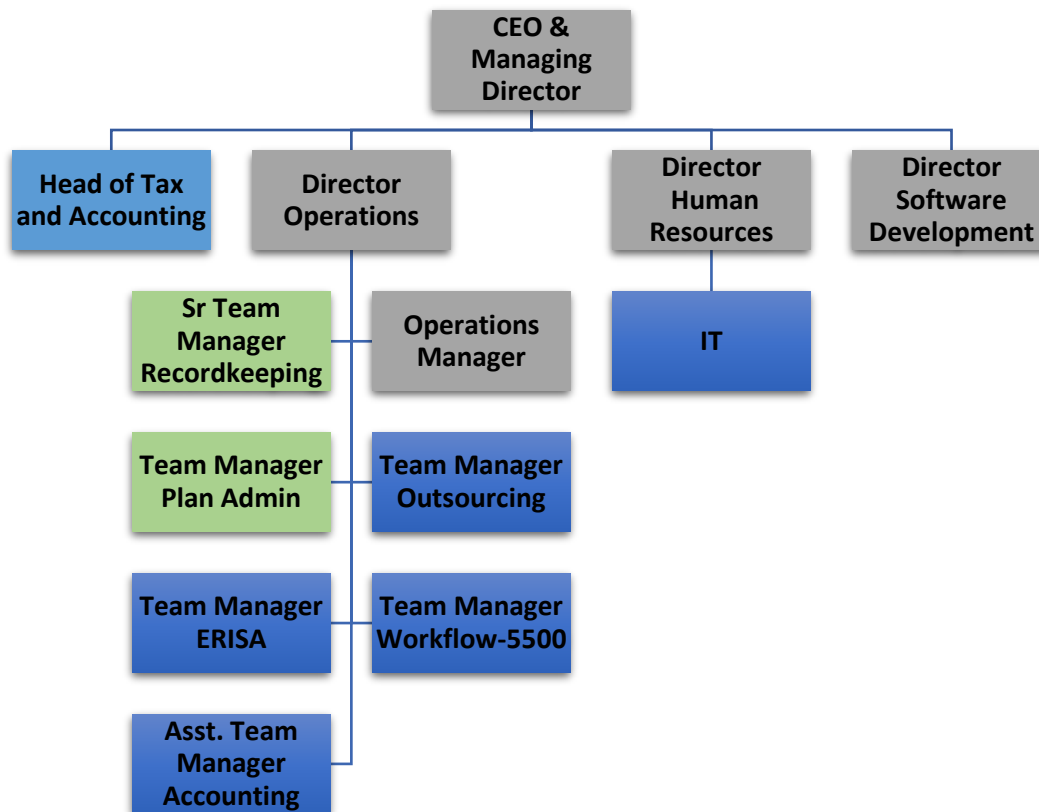
Data-path Limited gives the following services to its clients:

- | | |
|-------------------|------------------------|
| 1. Plan Design | 3. Administration work |
| 2. Setup the plan | 4. Client Services |

Logo

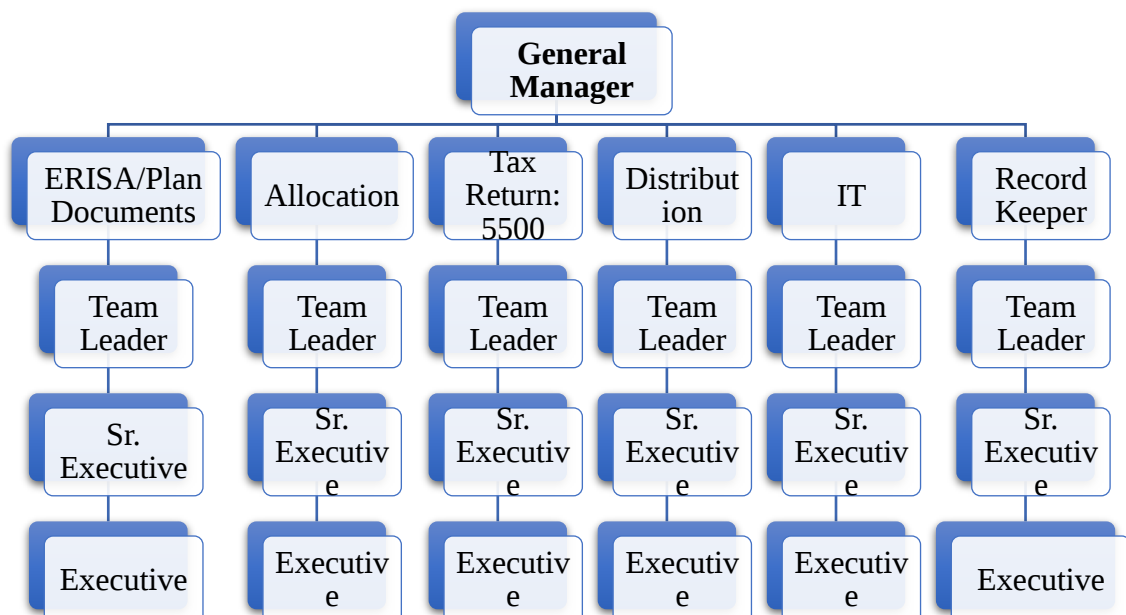


Organizational Structure



My position was Intern officer and I was working under ERISA department. Every department has their extended structure.

Other Departmental Structure



Strategic SWOT Analysis

		STRENGTHS	WEAKNESSES
SWOT Analysis: " DataPath Limited."		•Secured software and IT-based service. •Less competitor in the local market. •Offering a lower price than other third parties in the USA. •Sustainable business growth in Bangladesh. •Earning foreign remittance for Bangladesh.	•Lack of face-to-face communication with the client. •The fully new service industry in Bangladesh. •Employees need to train from zero knowledge and its time-consuming. •Lack of promotional activities.
THREATS	•Clients are not bound to promissory. •Fully depend on third party companies in the USA. •New competitors in the local market. •Not a renowned service sector in Bangladesh.	<u>CONFRONTATION</u> -For charging lower price clients remain constant. -As more market yet to explore so lower threat from competitor. -As dependent on third party so BPO team working with other client except July service.	<u>AVOID</u> -Promotional activities are increasing. -To avoid communication gap video conferencing are arranged with the clients. -As this industry is growing, we have more trained people to train new employees
OPPORTUNITIES	•Creating new employment. •Creating a new service industry in Bangladesh. •Making a partnership with different countries. •Workflow depends on the US economy.	<u>EXPLOIT</u> -For availability of more educated people, it is easy to provide service with a lower price. -For working with foreign countries, it helps to gain foreign remittance	<u>UNDECIDED</u> -As new service industry in Bangladesh it is bringing new opportunities for employment -For having sustainable growth trained people are available in the company.

CHAPTER 3: SERVICE ANALYSIS



Service Analysis:

In USA, retirement industry is very important and huge effective Industry. It takes a big portion of USA economy. Employee invest their retirement money to Money Market. They invest their asset to various sources. That's why USA has huge money market. But for this so may parties do several types of work.

Here we can see which types of service should make sure for run this industry smoothly?

Services: DataPath provides the following services to their client-

- a) Plan design
- b) Setup the Plan
- c) Administration related work
- d) Client Services

Retirement Plan Design: To meet unique goal for each employer this company create different types of retirement plan according to US govt. and IRS maintained rules and regulations. The main objective is to maximize the benefit for their client.

Setup: It make sure the services are efficiently setup under the respective retirement plan or the converted system of their plan design.

Retirement Plan Documents: This service makes sure the plan documents prepared by ERISA (Employee Retirement Income Security Act.) consultants. Its maintain the following standards-

- Plan Documents prototype
- Volume Documents submitter
- SPD (Summary Plan Description)
- Loan service policy
- Qualified Default Retirement Operations Procedure
- Required others Forms

Retirement Plan Setup & Pre-Conversion: The setup team of DataPath are fully dedicated to hands-on services to coordinate all aspects of plan setup or pre-conversion. It includes-

- Prepare Enrollment information
- Enrollment Meetings coordinate
- Paperwork Setup
- Follow on the contribution submission
- Asset transfer coordinate

Retirement Plan Administration: Data-path's Limited have more than 12 years of experience in retirement plan administration related work and its related technical field. It is a team of highly experienced professionals for a dedicated account representative services of retirement plan.

Plan Operation Support:

For maximize the value of a plan it provides everything according to clints need. It also includes-

- Plan performing eligibility
- Plan asset contribution allocations
- Vesting time calculations
- Service distribution and loan processing

Compliance Testing: DataPath Limited provides a complete compliance testing services to their client to maintain the integrity. This service includes the following-

- Forfeiture testing
- ADP testing
- ACP testing
- Coverage testing (Minimum/Maximum)
- Non-discrimination testing

Tax Compliance: Data-path provides the Tax compliance Services. Its include the following-

- Service Form 5500
- Service Form 1099-R & Form 945
- Service Form 5330 (when needed)
- Service Form 5310 (for plan termination)

Recordkeeping: DataPath on the behalf of July Business Service provide the recordkeeping service for their clients. It is one of the biggest challenging service for this retirement industry. It includes-

- Client internet access (24 hours)
- Day to day valuation of accounts
- Sponsor account access in plan
- Statements prepare for client (quarterly/annually)

Participant Services: It provides high quality tools available for the client participant to achieve a secure financial future. To make sure that it has alliance partnership with financial providers.

Investment Advice: There are some retirement products who includes participant access to online investment advice and required guidance. For receiving online investment, participant should have the ability and advice that increase their chance to achieve secure financial future. In Bangladesh, DataPath use its own trusted network and make sure all administrative work for July Business Services.

CHAPTER 4: INTERN ACTIVITIES & LEARNINGS



Activities Undertaken:

ERISA Consulting/ Plan Documents Department

ERISA deals with the plan document. They prepare all types of document from the information provided by the Sales and Installation department. Various types of plan like 401(k) plan, Safe harbor plan, profit sharing plan, QDIA, Solo/Non-solo plan have different types of document according plan design. Documents define law, rules & regulations and how these will effect on the plan. ERISA ensure all the right and authentic information which will be followed by all other department.

Some of the work activities are listed below:

- Cycle 3 restatement
- PPA restatement
- Document Tagging
- Plan amendment
- Enrolment Kit
- F8822b Form

Cycle 3 & PPA Restatement:

Cycle 3 Restatement is based on PPA Restatement. PPA Restatement is an old version of the system and Cycle 3 Restatement is the latest version. We are converting PPA Restatement to Cycle 3 Restatement. In that part, we check a few sections and charges a few things in one or two sections based on PPA Restatement. After changes, we download a few files From DGEM System and upload the files in Unify System. Then we start tagging in task #230 which name is “Obtain ALL Cycle 3 Signature Pages” and Sent for the signature to clients in task #120 Which name is “Assemble Reports, Post to Portal, Notify Client that Cycle 3 Restatement is Ready to Sign”. After that, we change the plan status “Sent to Client”.

Document Tagging:

Document tagging means the document sent to client and notify them that we prepare your plan document as per your instruction and followed all the USA retirement policy law, now you need to recheck your full plan document. Is it ok or not? If not then let us know, if ok then please send us the signed copy to future process. For ERISA service it is a very important and mandatory task.

Plan Amendment:

For Plan Amendment, when a client wants few changes in a specific plan we do the Plan Amendment. In that part, we remove the previous information in DGEM System which I have to

change and add the new information in DGEM which is given by the client. After changes, we download a few files based on changes and upload the files in Unify System. Then we start tagging in task #110 which name is “Obtain ALL Cycle 3 Signature Pages” and Sent for the signature to clients in task #90 Which name is “Assemble Reports, Post to Portal, Notify Client that Cycle 3 Restatement is Ready to Sign”. After that, we change the plan status “Sent to Client”.

Enrollment Kits:

For Enrollment Kit, we download a file from Unify System and match that file with DGEM System file in the same project. If we found all the match, we complete the task #40 which task name is “Review the Plan Highlight”. After that in task #60, we assign to “Enrollment kits” which task name is” Finalize and Provide Final Proof to CSM”.

F8822b Form:

ERISA prepare the F8822b form. This is a form that need to prepare when a client needs to change their information. For example, a client change his/her house address. Now he/she also wants to change it on his/her retirement plan document. For this type of issue, we need to prepare this form and signed by client. Without this we do not supposed to change any information in our database system.

Lesson Learnt from the Organization

Internship is a program where a student can work in an organization to gain real life knowledge of corporate world, working experience and appreciable working skills. Due to my internship program, I was able to work with DataPath Limited and gain some real knowledge about retirement policy, and related followings:

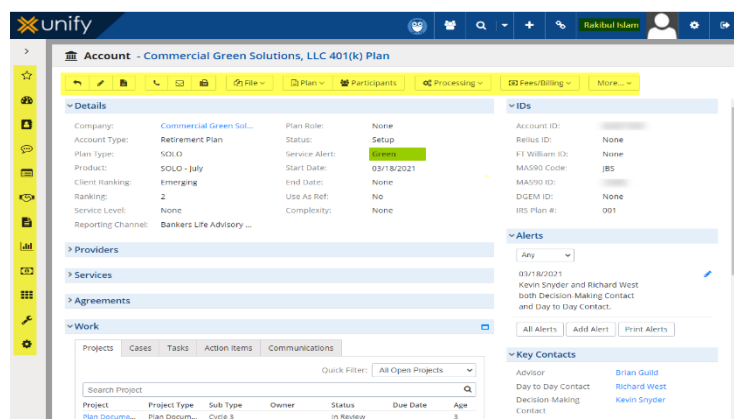
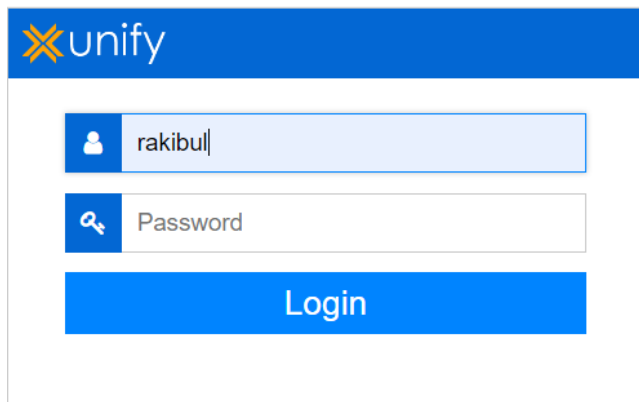
Knowledge about the US Retirement Plan industry

As DataPath Ltd is an outsourcing company and working as third-party agency on US retirement plans, I have learned lots of thing about US Retirement plan industry. These plans owned and hold by employers, insurance companies, trade unions, the government, or other institutions. These plans are classified only two ways. Defined benefit plans and Defined contribution plans, depending on how benefits are determined.

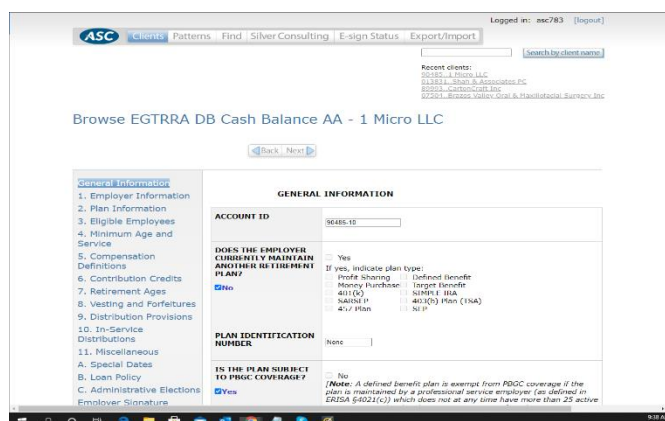
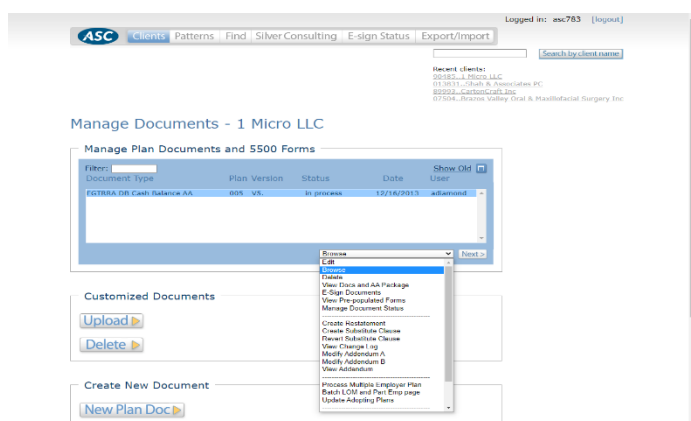
Some high valuable Software:

During this Internship period I learned and process my work in some valuable software. Just like

- **Unify (Database Software):** Unify is a Database software that developed by Datapath Software Development Department. All of the plan information, Company information, Service-related update, Task assignment, internal workflow all of them are managed by this Software. Here is some Unify Work related example-

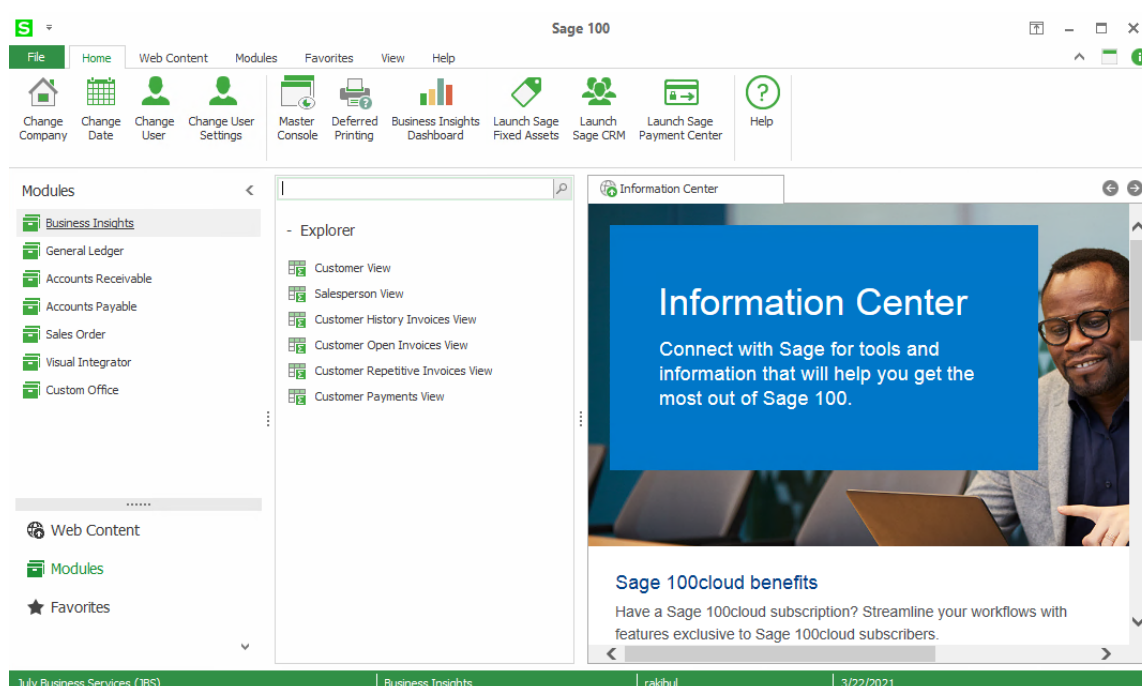


- **DGEM (Processing Software):** This is also an Internal work-related software developed by Datapath. We used it for generate all types of plan legal Documents. Adaption Agreement (AA), Trust Agreement, Loan Agreement, Service Agreement, Summary Plan Description (SPD), Safe Harbour Notice (SH) etc. document generate is the main work for this Software. We also call it as ASC software. Some work examples of DGEM-



- **Relius (Processing Software):** Relius is a Processing Software for Datapath. It's a paid software. It works for Calculating the Funds, Assets, Money for each of the participant. Some security purpose I am not able to show this software work related examples.

- **SAGE 100 (Accounting Software):** Sage 100 is an Accounting Software. It is also an outsider paid software for Datapath. This software used by our Accounting team, Actuarial team, 5500 workflow team. This software does the accounting related work for Plan Sponsor, Client, Participant. SAGE 100 related example-



More proficiency in Microsoft Excel

During the internship time period, I joined many short time training sessions on Microsoft Excel because of processing a plan I had to operate in Excel. This expertise increases my work level in further career and make it life easier.

Improved personal skills / decision making

In internship period, I improved a lot of my skills with the knowledge of fulfilling a task and my desired career path. I have improved my existing skill and also have gained some unique skills as well, which will help me further in my career, such as critical thinking during tough situations.

A greater sense of professionalism

As a new comer in new environment and in a completely different culture than I was, it could have been difficult to get used to. But I learned how to navigate the working world in real life as I completed my studies in Bangladesh. Now I have a better knowledge to act as a professional in the corporate world and adjust accordingly.

Time management and priority setting

Having workload and deadlines, it helps me to acquire the time management skills and set my priorities so that I finished my work within deadlines. Working Priority is the most important thing to finish the work on time. And this is what I learned during my four months internship period.

Success comes through great work

"The only time the word success comes up before work is in the dictionary." This phrase has been proven to me that in the real world the only way to be successful, is moving up the ladder, only if I do great work and impress my supervisor.

CHAPTER 5: CONCLUSION

datapath

Conclusion

Outsourcing companies are developing around the world, Bangladesh additionally doing admirably in this industry. In Bangladesh, there are many outsourcing companies, but a couple of company progressing nicely, Data-Path is one of them. Data-Path is controlled by Jim Hudson and John Humphrey from America. They recruited solid motivated individuals who were consistently willing to learn new things and developed from six representatives to around 150 employees within twelve years and it is still growing. During my four months at Datapath Limited, I must realize quite a great organization working in an environment where the employees consistently can share their plans to make the process simpler and better. It is never simple to clarify anybody where I have been doing my Internship, this organization is successful for being the best Third-Party Administrator (TPA) Outsourcing partner, in United State of America. It works in assistance of July Business Services. Now Data-Path has eight more outsourcing partners other than July Business Services. I am happy that I got the chance to do my internship program at Datapath where I could learn huge masses of things and got profession and requested guidance from my administrator which I will remember for the rest of my life and apply accordingly.

Proposed Improvement Plan

Existing Problem/Weak Areas of the Organization as identified in the AR	Actions to be Taken/Proposed Solution to the Problem	Strategy (Mode of implementation or ways of addressing the problem)	Office/Personnel Involved (Who will implement and who will benefit/affected by the Action/Solution)	Resource Requirements (Manpower and Financial)	Expected Concrete Result/Outcome
1.Server Problem	They can think about the development of the server	Updating new server with more data facilities.	IT Department	One updated server required	Server problem will be solved, and better services will give employees better work experience.
2. Lack of sitting space	They should try to give their employees enough sitting space.	Multiple sitting arrangements can be done using same space.	HR Department	Two more sofa should be added	Employees can have their own personal space.
3.Pc Hardware Problem	They should develop their Pc hardware.	Use Core i3 Processor and Use 8gb Ram.	HR Department, IT Department	Can implement Core i7	Employees can work faster.
4.Lift Space problem	They should give the opportunity to use 2nd lift of the office.	One lift is not enough to for the employees. So, they identify the problem and come up with a solution.	HR Department And building manager	Lift manager can implement even and odd number for different lift	Employees can reach office at time.
5.Transportation problem	They can sign a contract with any bus company to take two bus for transportation	By using common route employees can have bus facilities.	HR Department	Two bus required	Employees can reach office at time and go home safely in the pediment situation.

CHAPTER 5: REFERENCES & APPENDIX

datapath

References

1. Data Path Limited, (2010) Retrieved from <http://www.data-path.net>.
2. July Business service,(2021) Retrieved from <https://www.julyservices.com/about-us>.
3. Relius, (2021) Retrieved from <https://www.relius.net/about/>
4. Khandaker Fazle Rabbi, Director, Human Resource department ,DataPath Limited
5. Gufran Siddique, Executive officer, ERISA department ,DataPath Limited.
6. Datapath Employee Book.

Appendix

List of Abbreviation

ERISA	Employee Retirement Income Security Act.
CSM	Client Service Manager
CSA	Client Service Associate
IC	Installation Coordinator
RK	Record Keeping
QDIA	Qualified Default Investment alternative
SG	Setup Guide
AA	Adaption Agreement
SPD	Summary Plan Description
SH Notice	Safe Harbour Notice
BBA	Bachelor of Business Administration

INTERN MONTHLY PROGRESS REPORT
INTERNSHIP PROGRAM
Fall/Spring/Summer (2020)
School of Business and Economics
United international University

Student Name: Md Rakibul Islam	Institutional Supervisor: Taifur Rahman
Student ID #: 111 161 366	Institution Name DataPath Ltd.
Major: MIS	Academic Supervisor: Ahmed Imran Kabir

Activities undertaken during the month

Date	Dept.:	Activity: Basic knowledge about DataPath, July Business Service Inc., USA Retirement Policy, 401(k) industry, Plan Restatement, Solo & Non solo plan, PPA plan, Cycle 3 restatement.
Oct 01, 2020	ERISA	
Date	Dept.:	Activity: Cycle 3 Restatement, Document Tagging (e-Signature & wet-signature), Enrollment kit review.
Nov 01, 2020	ERISA	
Date	Dept.:	Activity: Enrollment kit review, Amendment plan.
Dec 01, 2020	ERISA	
Date	Dept.:	Activity: Termination Package, F8822b form, Hummel plans review.
Jan 01, 2021	ERISA	

Institutional Supervisor's

Date:10/02/2021.....

Time:10:00 am.....

Additional Comments

He is very sharp. He served my dept. 4 months and his performance was outstanding.

Supervisor Signature: 

Date: 10/02/21

Student Signature:

Date: