

WHAT'S NEW IN...

Profiles Forecaster (Phase 1 Update)

Release Date: February 11th, 2013

This update features changes to assumptions and values within Profiles™ including college cost information and social security updates, as well as miscellaneous updates to sample cases and printable forms.

WHAT'S NEW/FEATURES IN PROFILES™

College Cost Updates

Profiles Forecaster™ includes a new College Cost database for the 2012–2013 academic year, made cost and inflation information more visible, and updated values in the Cost of Education and the College Costs by Region reports.

Social Security Updates

Consists of updates to several indexed values including the earnings base, formula band points, and the average annual wage index amounts.

NOTE: The Social Security employee payroll tax will revert back to 6.2% based on the provisions laid out in part of HR 8.

Medicare taxes have been increased by 0.9% for “high income individuals.”

Sample Case Updates

The sample cases will be updated to reflect a 2013 plan year as well as in all other relevant fields.

Printable Forms

Printable forms will be updated to include the latest college costs, new estate selections, as well as new Roth 401(k)/403(b) functionality.

Contact Information and Additional Support

For additional support contact partner services:

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