Fast·Class File

Client Data System

Dynamic Report Download

Mandatory IRA Distributions

This dynamic report that will find all contacts who will need to take a mandatory IRA distribution in 2005. The report includes two filters: One to find all contacts turning 70 ½ years old during 2005, and all contacts holding IRA securities. The dynamic report will find the cross section of all contacts meeting the criteria of both filters.

Loading Files into CDS:

- From the main screen in CDS, select **Database** in the menu bar and then select **Utilities**.
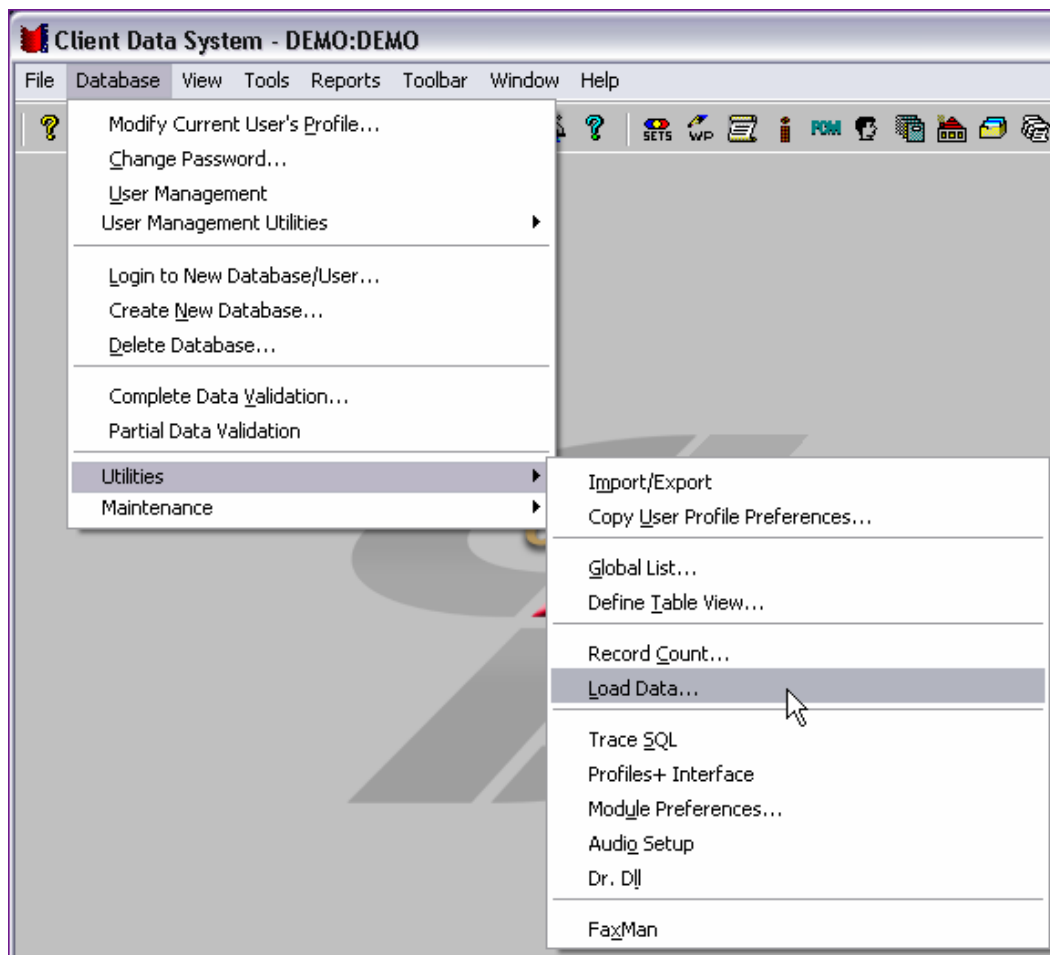- In the **Utilities** menu, select **Load Data**.

Figure 1: The Utilities menu (Load Data option selected).

- Select the **Other Files (*.dmp)** option in the **Select Data Load Options** window.

Figure 2: The Select Data Load Options window.

- Click **OK**.
- When the **Load File** window opens, use the **Look in** drop-down field to locate the **IRA_Dist** folder.
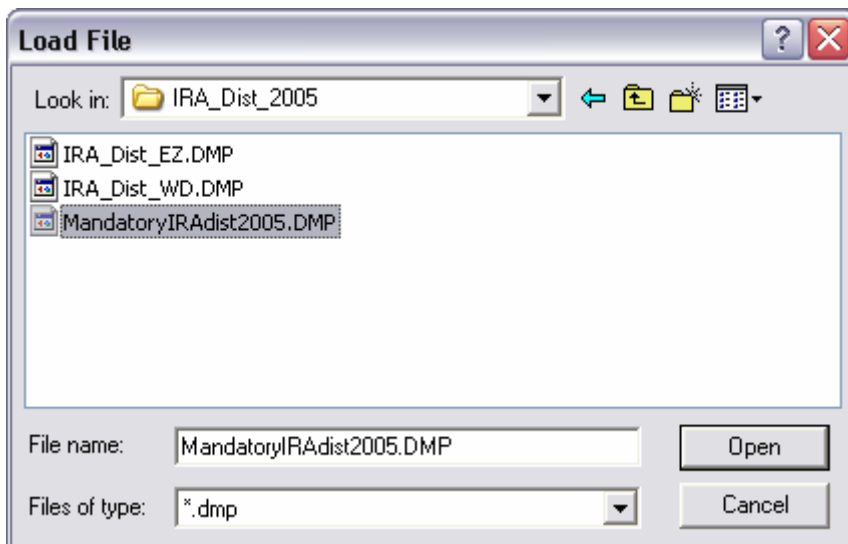

Figure 3: The contents of the IRA_Dist folder viewed from the Load File window.

The **IRA_Dist** folder contains three .DMP files:
  - The **MandatoryIRAdist2005.DMP** containing the Mandatory IRA Distributions in 2005 dynamic report with included filters.
  - The **IRA_Dist_WD.DMP** file with the IRA Mandatory Distribution Reminder letter in Microsoft Word format.
  - The **IRA_Dist_EZ.DMP** file with the IRA Mandatory Distribution Reminder letter in E-Z Editor format.

- Select the **MandatoryIRAdist2005.DMP** file and click **Open**. The Mandatory IRA Distributions in 2005 dynamic report with filters will be loaded into CDS.
- Using the same process (Starting from the main screen of CDS, select **Database** > **Utilities** > **Data Load**…), load one of the included approach letters.

Using the Mandatory IRA Distributions in 2005 Dynamic Report:

- Select **Reports** from the main screen of CDS.
- In the **Reports** menu, select **Dynamic Reports**.
- In the **Description** search field, type `Mandatory IRA` and click **OK**.
- A summary screen will open with the **Mandatory IRA Distributions in 2005** dynamic report on display.
- To modify the dynamic report or view the filter criteria of the attached filters – select the **Mandatory IRA Distributions in 2005** dynamic report and click the **Modify Record** button.
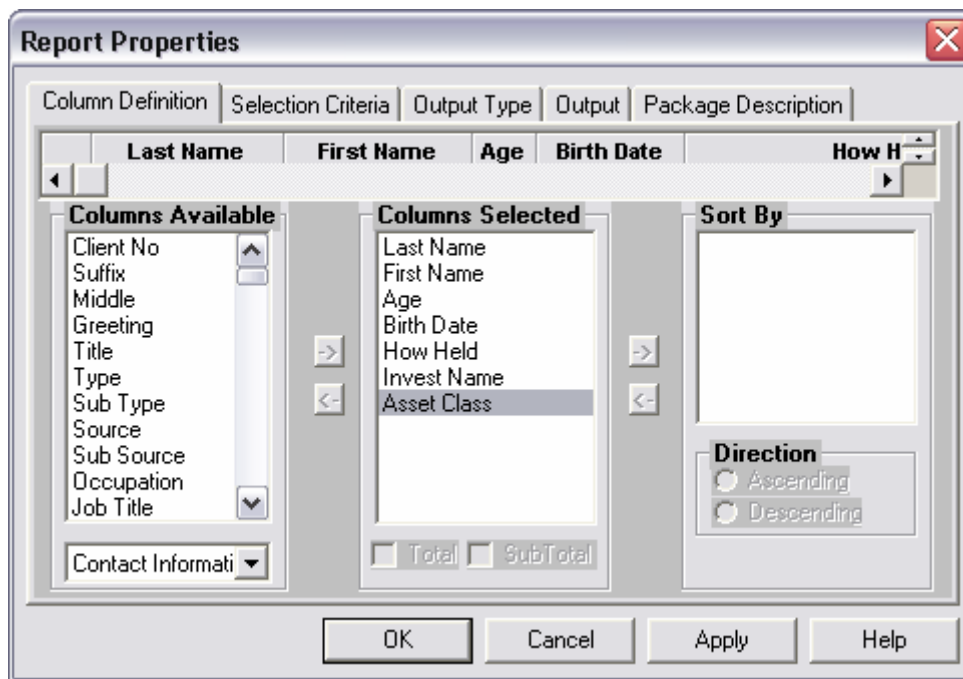

Figure 4: The Report Properties window of the Mandatory IRA Distributions in 2005 dynamic report.

- To run the **Mandatory IRA Distributions in 2005** dynamic report, double-click the report or select the report and click the **Run** button.
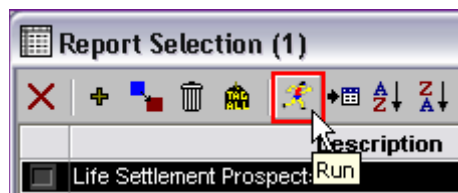

Figure 5: The Run button in the Report Selection Summary screen.

Using the IRA Mandatory Distribution Reminder Letter:

- After running the **Mandatory IRA Distributions in 2005** dynamic report, select records in the results and click the **Spreadsheet Correspondence** button.
- Select **Form Letter** in the **Spreadsheet Correspondence** window.
- Enter IRA Mandatory in the **Description** field of the **Find Form Letter** window and click **OK**.
- Select the **IRA Mandatory Distribution Reminder** letter and other options in the **Print/Fax/E-mail Form Letter** window and click **Print**.

Figure 6: The Print/Fax/E-mail Form Letter window.

- Review the letters and click **Print**.

Modifying the IRA Mandatory Distribution Reminder Letter:

- From the main screen in CDS select **Tools** in the main menu and then select **Form Letter Maintenance**.
- Enter `LTC` in the **Description** field of the **Find Form Letter** window and click **OK**.
- Select the **IRA Mandatory Distribution Reminder** letter in the **List of Form Letters** summary screen and click the **Modify Record button**.
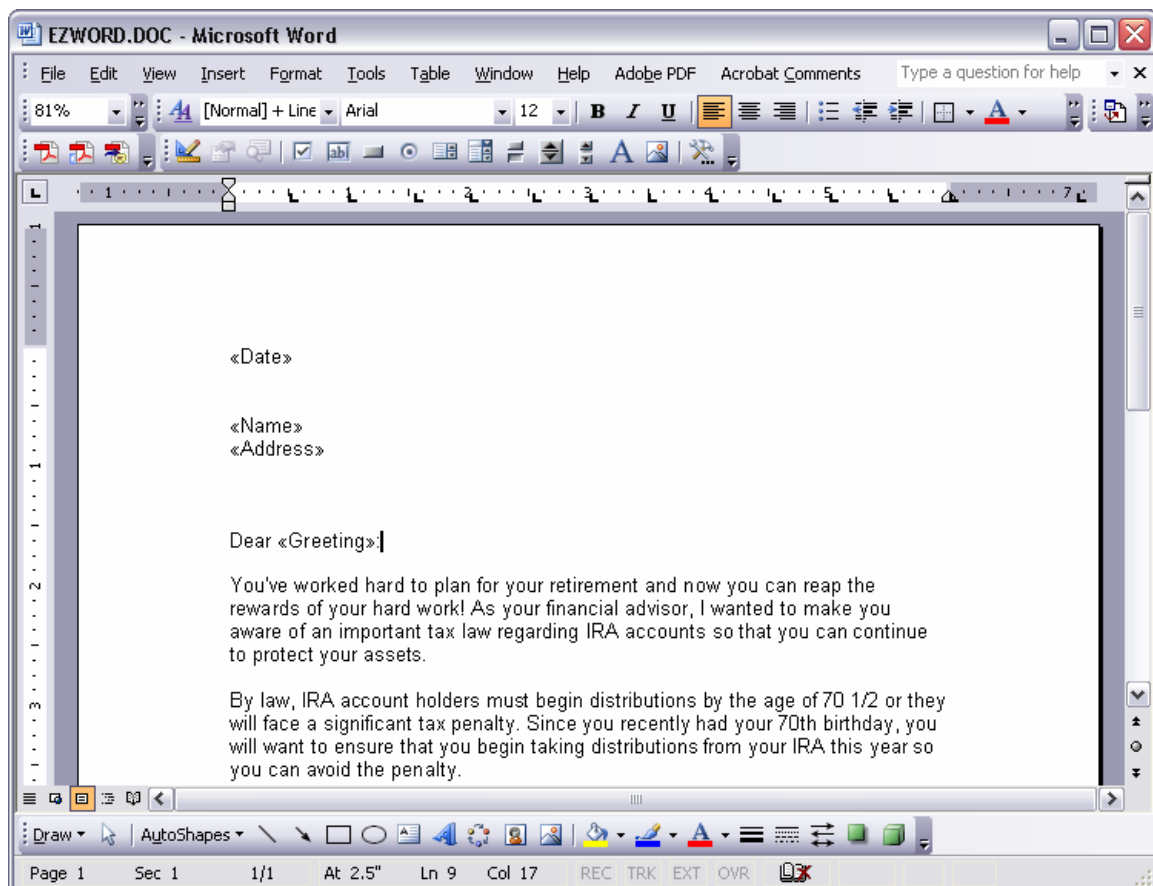

Figure 7: IRA Mandatory Distribution Reminder Letter (Microsoft Word version).

- Modify as needed.
- When finished, close the document and (if needed) make any changes to the name of the document in the **Form Letter Description** window and click **OK** to save changes.