OFFER YOUR CLIENTS BRANDED PARTICIPANT & PLAN SPONSOR WEB PORTALS

- Provide the same sophistication and functionality as the largest financial institutions at a fraction of the cost
- Reinforce your client relationships by providing a secure web portal
- Provide separate access for advisors and brokers
- Eliminate the need for complicated hardware

CREATE HIGHLY PROFESSIONAL WEBSITES FOR YOUR CLIENTS

Customize colors, fonts, easily add client logos and tailor menus to fit each plan.

Additional features include:

- Online statements
- Participant level fund performance (individual rates of returns)
- Online enrollment and ongoing changes (including Roth)
- Online participant loan and distribution requests
- Customized messages
- Auto rebalance features
- Options to download forms and periodic statements
- Additional links and web pages are easily added
- Tablet and smartphone compatible

GEMINI PLAN SPONSOR WEB PORTALS: DAILY & NON-DAILY PLANS

Plan Sponsor sites can easily be customized in the same manner as the participant access site. Sponsors can conveniently access plan data, information on available investment options, asset allocations by fund and source, as well as transactional information and participant level data.

Sponsors can securely upload payroll and census files as well as download historical statements and related documents. Payroll and census uploads also have the option to perform a series of data checks and have the data uploaded directly to the plan; creating significant efficiency in periodic payroll processing as well as processing year-end census.

Tired of emailing data back and forth with clients? Offer your plan sponsors the ability to download prior valuations, statements and other information all through a secure and customized website.

ADVISOR/BROKER ACCESS

Similar to the Plan Sponsor Site, you can provide your advisors with specific access to only their plans to review, all with a single sign on. A variety of reports are available to review all associated plans, as well as identifying the relative usage of investment funds and investment profiles.

Streamline your year-end census collection process with Gemini's automated census upload feature.