



TAKE ADVANTAGE OF GEMINI'S INCREASED EFFICIENCY

Provide your DC and DB Plan Sponsors with 24/7 web-access to important related information; including administrative forms, valuation reports, compliance test results, plan documents and Annual Notices (eg. Safe Harbor, QDIA, etc.). In addition to the ability to retrieve information, Plan Sponsors may also submit sensitive files, forms and documents for processing via the secure file upload feature.

OFFER YOUR CLIENTS A CUSTOMIZED, ORGANIZED AND HIGHLY PROFESSIONAL WEB PORTAL

- Provide the same sophistication and functionality as the largest financial institutions at a fraction of the cost
- Reinforce your client relationship by providing a secure web portal
- Provide separate access for advisor and brokers
- Customize colors, fonts, and easily add logos to tailor your webpage presentation
- Customize your menu options and categories to fit your client's needs
- Add additional links and webpages as appropriate and needed
- Tablet and smartphone compatible

STREAMLINE YOUR DATA COLLECTION PROCESS

By utilizing ASC's robust suite of integrated systems, TPAs can significantly streamline the year-end census collection process:

- Provide clear guidance to your plan sponsors on their plan's provisions – publish Plan Documents, SPDs and SARs directly to Gemini from ASC's Document Generation & Management (DGEM) System for easy access and reference
- Batch create customized census files on ASC and post directly to Gemini Web Portal
- Batch create year end questionnaires and instructions using one of ASC's CRM's (PensionPal or Client & Task Tracking System)
- Utilize Gemini's Census File Upload Utility with data validation to help sponsors provide accurate data
- Encourage plan sponsors to update various census data via Gemini throughout the plan year
- Available for both defined contribution and defined benefit plans!

ADDITIONAL FEATURES

- Expanded integration to create and publish CATTs form directly to Gemini!
- Email notifications of Plan Sponsor uploads directly to Plan Administrators
- Participant DB access with options for requesting Benefit Estimates
- Updated to the latest security protocols and Enhanced ID and Passwords

WELCOME: BAILEY BROS BUILDING AND LOAN, INC 401(K) PLAN LOGOUT

PLAN INFORMATION PARTICIPANT REPORTS UPLOAD/DOWNLOAD FILES ADMINISTRATIVE SERVICES LINKS

PLAN INFORMATION

Home Page PRINT VERSION

PLAN INFORMATION	
Name	Bailey Bros Building and Loan, Inc
Address	2024 South St Murray Hill, NJ 03207
Contact	George Bailey
Phone	414-769-2580
Email	gbailey@isp.com

CONTACT INFORMATION	
Name	Successful TPA, Inc
Address & Suite	800 Jefferson St
City, State & Zip	Minneapolis, MN 55409
Phone	612-555-6678
Email	tpa@isp.net

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PLAN INFORMATION PARTICIPANT REPORTS UPLOAD/DOWNLOAD FILES ADMINISTRATIVE SERVICE

UPLOAD/DOWNLOAD FILES

Download PRINT VERSION

- ▶ MY DOCUMENTS
 - ▶ 2016 Valuation and Compliance Testing Report
 - ▶ 2017 Valuation and Compliance Testing Report
 - ▶ Fee Disclosures
 - ▶ Plan Documents
 - ▶ Summary Plan Description
 - ▶ Year End Data Collection Package
- ▶ GENERAL INFORMATION

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PLAN INFORMATION PARTICIPANT REPORTS UPLOAD/DOWNLOAD FILES ADMINISTRATIVE SERVICES LINKS

UPLOAD/DOWNLOAD FILES

Census Upload PRINT VERSION

Plan Name: Bailey Bros Building and Lo

Your Name:

Your Phone Number:

Your Email Address:

Submit Date: Jan 19 2020

Plan Year End Date: Dec 31 2019

Enter Census File to Submit: no file selected

Please Note: A series of Data Checks will be performed on the selected file. You will be notified if the file has been accepted or if any errors have been detected:

- Any static data values (e.g. birth or hire dates) in your file that are different than what we have on file will automatically replace previous data. You will be notified during the process of any changes and must authorize the changed data.
- Other errors may be detected. Certain errors must be corrected. Other errors can be bypassed with your authorization.