



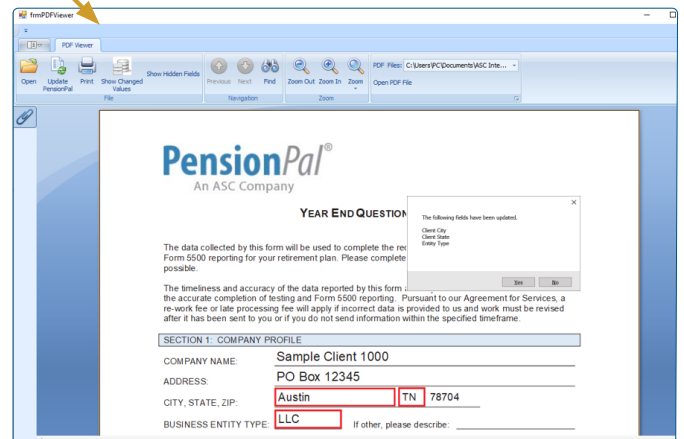
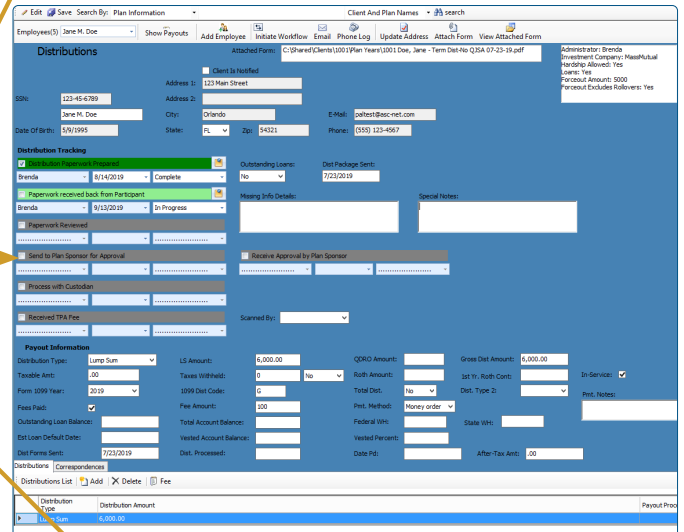
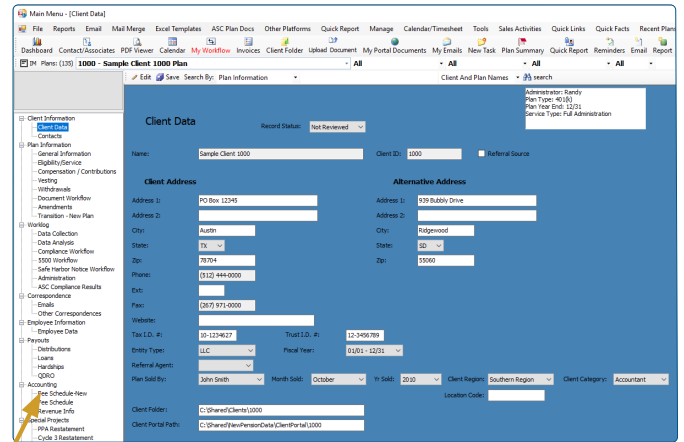
## A CLIENT-BASED MANAGEMENT SYSTEM BUILT FOR THE RETIREMENT PLAN PROFESSIONAL

ASC offers two complementary CRM/Tracking Systems: CATTS (Client and Task Management System) and PensionPal. Both track your clients, contacts, associated Brokers, Sales Agents, Accountants, have employee level security restrictions and can provide plan information with the click of a mouse. In addition to implementation assistance and ongoing support from ASC's terrific and experienced support staff, both systems offer customizable workflow and task management fields, on-demand or scheduled reports, and letter or e-mail merge capabilities. Contact ASC Sales at sales@asc-net.com or (800) 950-2082 x1 to discuss and find the perfect solution for your business needs.

PensionPal is built with the "soup to nuts" TPA in mind. PensionPal stores your client, contact, and plan data in a central location and offers additional flexibility such as customizable dashboards, sales tracking, integration with ASC and other systems, detailed workflow and employee task management. Secure file transfer web portal option is available.

### Special Features:

- Customizable color screens allow users to easily identify Client and Prospect information while tracking data for multiple years
- Log all client correspondence with PensionPal for Outlook Add-In email integration feature
- Keep track of all payouts (Distributions, Loans, Hardships & QDROs)
- Attach notes, PDFs and e-mails in PensionPal for uninterrupted client support during staff absences
- Mass create fillable PDF Forms such as Annual Questionnaires and click once to update all returned information
- Pie-chart diagrams provide at-a-glance answers to referral source, investment, staffing resource, and other important profitability questions.
- Detailed time and billing information tracks employee production and generates invoices
- Go Mobile! Download the PensionPal App from iTunes, Google Play and Windows Store



PensionPal An ASC Company		INVOICE #	
DESCRIPTION	QTY	RATE	AMOUNT
Sample TPA 123 First Street Anytown, CA 12345			
Base Setup Fee	1	\$1,000.00	\$1,000.00
Base Fee:	1	\$2,000.00	\$2,000.00
Participant Fee:	50	\$40.00	\$2,000.00
Misc Fee:	1	\$300.00	\$300.00
Employee Fee:	1	\$300.00	\$300.00
<b>Current Charges</b>			<b>\$5,600.00</b>
<b>TOTAL DUE:</b>			<b>\$5,600.00</b>