ASC

PensionPal®

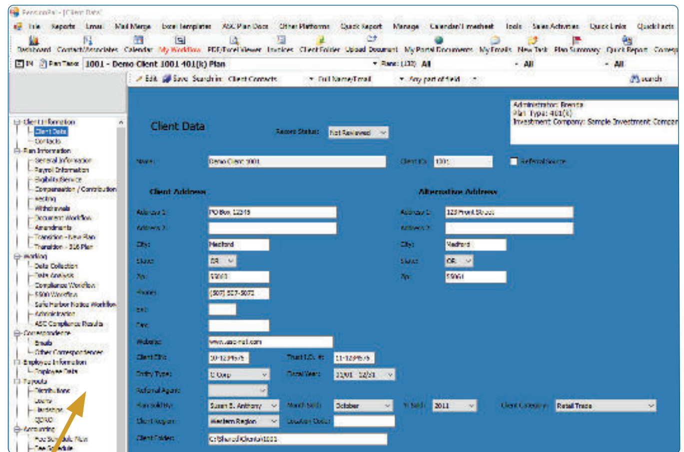
Premise-based CRM & Workflow Management System

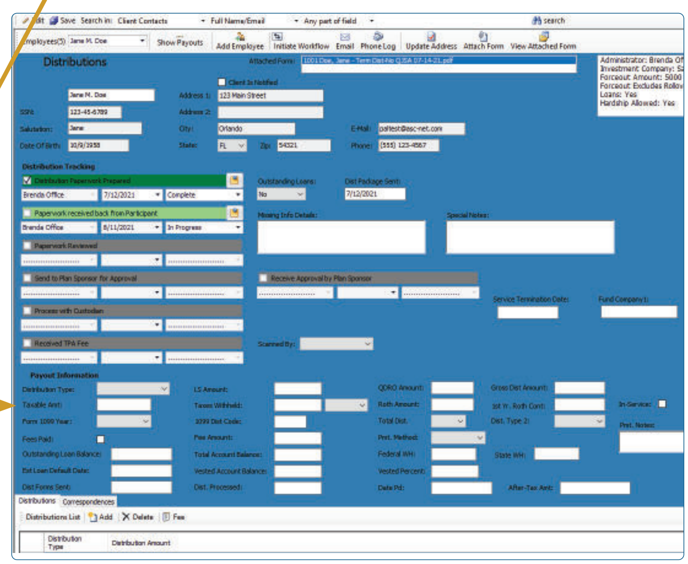
A PREMISE-BASED MANAGEMENT SYSTEM BUILT FOR THE RETIREMENT PLAN PROFESSIONAL

ASC offers two complementary CRM & Workflow Systems: Pension*Pal* and CATTS (Client and Task Tracking System). Both track your clients, contacts and associates, have employee level security restrictions, and keep plan information at your fingertips. In addition to implementation assistance and ongoing support from ASC's experienced support staff, both systems offer customizable workflow and task management fields, on-demand or scheduled reports, and letter and e-mail merge capabilities.

Pension*Pal* is built with the full service TPA in mind. Pension*Pal*'s customization enables you to work with your staff roles and outside partners to process your plans efficiently and exceed your clients' expectations. Pension*Pal* offers additional flexibility such as customizable dashboards, sales tracking, integration with ASC and other systems, detailed workflow and employee task management; as well as, correspondence and payout tracking.

ASC Sales at sales@asc-net.com or (800) 950-2082 x1 to discuss and find the perfect solution for your business needs.





Special Features:

- Customizable screen colors allow users to easily identify Client and Prospect information, plan year ends, and the status of plans
- Worklog and Accounting sections track data for multiple years
- Log all client correspondence with Pension*Pal's* Outlook Add-In email integration feature
- Keep track of all payouts (Distributions, Loans, Hardships & QDROs)
- Attach notes, PDFs, and e-mails for uninterrupted client support
- Creation of merged templates using values from Pension*Pal* and Microsoft products
- 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