SAVE TIME AND CREATE EFFICIENCIES

The PensionPal Web Portal facilitates timely and accurate information flow between TPAs and Plan Sponsors. Your branded portal provides Plan Sponsors access to information; as well as, the ability to upload and submit information securely, and complete information online. In addition to being branded with your logo, the Plan Sponsor Instructions and Forgot Password templates are completely customizable.

SECURE FILE TRANSFER WEB PORTAL:

- Utilize Two Factor Authentication

- Secure File Transfer – Upload and download files securely. Eliminates the need to maintain another external service

- Contacts – View assigned contacts and their portal access

DOCUMENT DELIVERY:

Specific areas for document storage eliminate the need to send via email or mail.

- My Portal – Upload plan specific documents in bulk or on a case by case basis. Track access and downloading in PensionPal and through notifications

- Plan Documents – The files that are uploaded to the Plan Documents folder are available under the Plan Documents tab in the PensionPal Portal. These documents can be downloaded by the plan sponsor. A great place to have the current plan documents!

- Year End Reports – The files that are uploaded to the Year End Reports folder are available under the Year End Reports tab in the PensionPal Portal. These documents can be downloaded by the plan sponsor

- General Documents – Upload public documents that you want available to all portal users such as a base plan document or IRS table of limits

- News and Updates – Upload public documents that convey news or updates such as newsletters or announcements

STREAMLINE THE DATA COLLECTION PROCESS:

- New Client Onboarding – create an onboarding questionnaire to gather pertinent information on new clients and their plans

- Consolidate collection in one place for year-end information (W-2s, K-1s, questionnaire, census, etc.)

- Notifications – Email Plan Sponsors when documents are uploaded. Receive notification when files are accessed, downloaded and/or uploaded

- Excel census files can be downloaded for completion or completed online

- Questionnaire – create your annual questionnaire in PensionPal for Plan Sponsors to complete online. View and track completion progress