

Expand Your Doc Generation Options with DGEM!

Service Agreements | Investment Contracts | Checklists | Implementation Forms & More

Add the '**Custom Admin Docs**' feature to ASC's Document Generation & Management (DGEM) platform to automate all the documents you need to set-up a retirement plan and more.

The data is shared among the various forms so it never has to be entered again.

MITIGATE RISK OF ERRORS

ENTER DATA ONLY ONCE

INCREASE EFFICIENCY



Batch create
document
packages for
thousands
of plans

Retirement Plan Software, Documents & 5500s

info@asc-net.com | www.asc-net.com | (800) 950-2082 x1

ASC

Exponentially Increase Efficiencies

By adding 'Custom Admin Docs' to DGEM

In addition to managing retirement plan documents, ASC's Document Generation & Management (DGEM) platform can simplify the generation of the documents you need to set up and administer your retirement plans, as well as other relevant documents.

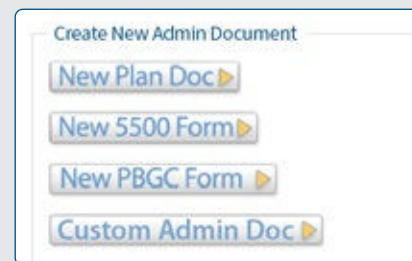
Building on the DGEM platform you're familiar with, we will work with you to program your existing administrative documents, by creating user-friendly checklists for each document with validations to improve accuracy.

Custom Admin Docs will create the forms and package that can be delivered automatically and electronically to your plan sponsors via e-sign or the DGEM API.

All the information collected via the checklists is housed in DGEM. DGEM can be set up to automatically share this data with other systems such as your recordkeeping system.

Using DGEM as the "single point of entry" means you enter the data only once into DGEM. The information populates each document with the applicable data saved in the system.

Data already entered in DGEM for your Plan Documents will flow into other documents that need the same data (e.g. service agreements, fund reports, distribution policies, participant notices, state contracts, forms and more).

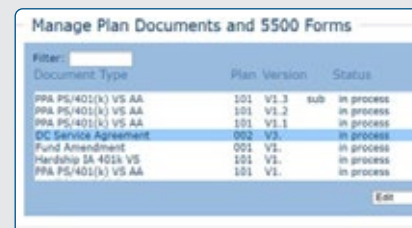


Option to create new Custom Admin Docs

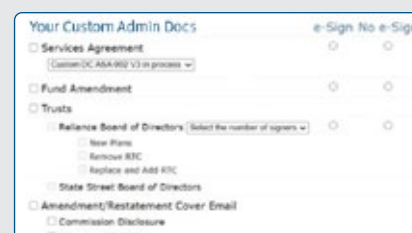


DGEM Custom Admin Docs checklists have the same look and feel as DGEM Plan Docs

DGEM: SINGLE POINT OF DATA ENTRY FOR ALL FORMS					
DGEM Checklist Data	Sample Admin Docs				
	Service Agrmnt	AA	SPD	QDIA Notice	Loan Doc
Plan Sponsor Name	✓	✓	✓	✓	✓
Plan Name	✓	✓	✓	✓	✓
EE Age & Service	✓	✓	✓		
Match Formula	✓	✓	✓		
Loan Info	✓	✓	✓		✓
Dist. Frequency	✓				
Fund Info	✓			✓	



Manage Plan Documents list displays all Plan Docs and Custom Admin Docs for clients



Customized Admin Document Packaging options to create a document package for the client that includes all relevant documents

- Web-based user-friendly checklist(s) for data elements
- Data validations, identifying missing data and formatting issues
- Checklist data integrated into relevant documents and forms on DGEM
- Generate, manage, and maintain plan documents with output to Word or PDF
- Document history retained
- Tracks status for workflow management
- Integration into ASC's Compliance Testing software included for standard forms, available for custom forms
- Batch processing functionality and Wizards to boost efficiency
- API available for easy data transfer into and out of DGEM