

AUTOMATE EVEN MORE WITH YOUR EXISTING ASC PLAN DOCS SYSTEM

Service Agreements | Investment Contracts | Checklists | Implementation & More

Add the '**Custom Admin Docs**' feature to your existing ASC Plan Docs System to automate all the documents you need to set-up a retirement plan and more. The data is shared amongst the various forms so it never has to be entered again.

MITIGATE RISK OF ERRORS

ENTER DATA ONLY ONCE

INCREASE EFFICIENCY



Retirement plan software, documents & 5500 forms

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Exponentially Increase Efficiencies

With the 'Custom Admin Docs' add-on to your existing ASC Plan Docs System

In addition to managing your plan documents, your Document Generation & Management (DGEM) System can automate the documents you need for set up and ongoing administration of a retirement plan plus any other relevant documents. Building on the same platform you're familiar with, we will work with you to program your existing administrative documents, including creating user friendly checklists for each document with validations to improve accuracy.

You can then create the forms and put together a package that can be delivered automatically and electronically to your plan sponsors via email or use of the DGEM API.

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

DGEM, as a "Single Point of Data Entry", means you enter the data only once into DGEM, then the data can be shared and each document can pull the data it needs from the DGEM System.

Any data you've already entered for your Plan Documents can flow into other documents that need the same data, such as: service agreements, fund reports, distribution policy forms, participant notices, state contracts, forms and more.

Option to create New Custom Admin Docs

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

| DGEM: SINGLE POINT OF DATA ENTRY FOR ALL FORMS | | | | | |
|--|-------------------|----|-----|-------------|----------|
| Check list data held in DGEM | 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
- Includes tracking of status to manage the process
- Integration into ASC's Compliance Testing software included for standard forms, available for custom forms
- Batch processing functionality and Wizards to add efficiencies
- API available for easy data transfer into and out of the DGEM Custom Docs System

