

EASIER & MORE EFFICIENT DATA COLLECTION FOR TPAS AND PLAN SPONSORS

Plan Sponsor Connect features a simple, easy to use interface via a modern, fully hosted, secure web portal.

Customizable online questionnaires and census submission with data validation and real time dashboards for status tracking increase your efficiency. Plus you can share and exchange files securely, track progress, send updates, provide important plan related documents, and more.

- Streamlined data collection - including customizable on-line questionnaires and census collection (with data validation!)
- Eliminate security risk and concerns of sending & receiving unsecured emails containing PII
- Dashboard for TPAs to easily and quickly monitor and track statuses
- Batch email to invite plan sponsors to their year-end data collection process
- Bulk download of submitted data
- Modern, user-friendly plan sponsor interface with branded landing page and customizable menus; no need for a "web-design" guru
- Provide plan sponsors with 24/7 online access to important plan information (SPDs, Valuation Reports, SARs, Administrative Forms and more)
- Provide advisors, CPAs and other industry partners with a secure method to exchange data
- Training and ongoing support provided by ASC's industry experts!

Plan Sponsor Connect is available independently or as part of ASC's suite of Retirement Plan Systems

Plan Name	Plan Number	Year	Status	Participants
ABC Company Plan	12345	2023	Completed	John Doe, Jane Smith
XYZ Corp Plan	67890	2023	In Progress	Bob Johnson, Alice Brown
DEF Inc Plan	11111	2023	Not Started	Charlie Davis, Eve White

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QUESTIONNAIRE TEMPLATES

NEW QUESTIONNAIRE TEMPLATE >			
NAME	YEAR	ASSIGNED TO CASES	ACTION
2023 Year End Questionnaire DB	2023		Edit Assign to Cases Clone Rename Delete
2023 Year End Questionnaire 401(k)	2023		Edit Assign to Cases Clone Rename Delete
2023 Year End Questionnaire PSP	2023		Edit Assign to Cases Clone Rename Delete
Template Questionnaire DC	2023		Edit Assign to Cases Clone Rename Delete
2023QuestionnaireDC	2023	1 Case	Edit Assign to Cases Clone Rename Delete
Questionnaire 1	2022		Edit Assign to Cases Clone Rename Delete