

BOOST YOUR EFFICIENCY

Keep your documents organized and updated using our web-based platform.

- Manage plan documents & 5500s on one screen
- Keep track of document history and status
- Checklist format enables fast & accurate document creation
- One-click data validation
- Clear navigation of plan provisions
- Documents are drafted and supported by ASC's In-house ERISA Attorneys & Experts

CREATE VIRTUALLY ANY PLAN TYPE WITH EASE

- Pre-approved DC, DB, CB and 403(b) documents
- Individually designed 457(b) Governmental and Tax-Exempt Documents
- Multiple Employer Plan (MEP) and Pooled Employer Plan (PEP) processing feature provides maximum plan design flexibility, including custom SPDs
- Restate or modify plan documents in batch
- Flexible document delivery options include: print, email, publish to Plan Sponsor Connect, send for E-sign
- One-click document delivery package - including customizable cover letters

SAVE TIME & REDUCE ERRORS

- Batch generate annual notices, pre-populated forms and interim amendments
- E-Sign functionality with auto-tracking via DocuSign
- Flexible API & Custom Admin Docs available to add to your DGEM Platform

Manage Plan Documents and 5500 Forms

Document Type	Plan Version	Status	Date	Hide/Show User
C3 PS/401(k) NStd (01-001/002) AA	005 V1	assigned	09/23/2022	Support
CGTBA PS/401(k) Prototype AA	005 V1	executed	06/06/2009	Admin
Form 5500SF	005 2021	Draft	06/23/2022	Support
PFA PS/401(k) VS AA	005 V1	executed	09/23/2022	Support
PFA PS/401(k) VS AA	005 V1.1	executed	09/23/2022	Support

Buttons: Upload, Delete, New Plan Doc, New 5500 Form, New PBGC Form, Edit Client

Edit C3 PS/401(k) NStd (01-001/002) AA - A1 Automotive

Buttons: Back, Finalize, Clear, Validate, Save, Save & Next

GENERAL INFORMATION

To order to save changes, click the save button.

ACCOUNT ID (optional):

DOES THE EMPLOYER CONSIDERLY MAINTAIN ANOTHER RETIREMENT PLAN? No

If yes, indicate plan type:

- Profit Sharing
- Defined Benefit
- Money Purchase
- Target Benefit
- 401(k)
- SIMPLE IRA
- SARSEP
- 403(b) Plan (TSA)
- 457 Plan
- SEP

TYPES OF CONTRIBUTIONS PROVIDED UNDER THE PLAN:

- Salary Deferrals
- Matching Contributions
- Limbo
- Nonqualified Safe Harbor Employee
- Traditional
- QNCA Employee
- QNCA Non-Employee

Safe Harbor and Annual Notices Wizard

Annual Notices C3 401(k):

Notice of Safe Harbor Contribution 401(k) / Automatic Defe

Next

Annual Notices C3 401(k) Gov:

Next



PLAN DOCUMENTS WE OFFER:

Cycle 4 Defined Contribution Plans: **Enroll Now**

Plans are Nonstandardized unless noted otherwise

- Profit Sharing/401(k)/Money Purchase Pension (Full & Collapsed AA Version)
- Standardized Profit Sharing/401(k) (Full AA Version)
- Owners (Solo) Profit Sharing/401(k)
- Governmental Profit Sharing/Grandfathered 401(k)/Money Purchase Pension
- Employee Stock Ownership Plan (ESOP)
- Non-Electing Church Profit Sharing/401(k)/Money Purchase Pension

Cycle 3 (Nonstandardized) Defined Benefit Plans:

- Defined Benefit (Integrated & Non-integrated)
- Cash Balance
- Governmental with Cash Balance provisions

Individually Designed Plans:

- 457(b) Governmental
- 457(b) Tax Exempt

Cycle 3 Defined Contribution Plans:

Plans are Nonstandardized unless noted otherwise

- Profit Sharing/401(k) (Full & Collapsed AA Version)
- Standardized Profit Sharing/401(k) (Full & Collapsed AA version)
- Owners Only
- Money Purchase Pension
- Governmental Profit Sharing/Grandfathered 401(k)
- Governmental Money Purchase
- ESOP/KSOP (Leveraged & Nonleveraged)
- Non-electing Church Profit Sharing/401(k)
- Non-electing Church Money Purchase Pension

Cycle 2 (Nonstandardized) 403(b) Plans:

- 501(c)(3)
- Salary Reduction Only
- Public School/Dual Status
- Non-electing Church (without Retirement Income Accounts)
- Retirement Income Account Church

More than 200,000 plans utilize an ASC plan document!

ASC's plan documents are drafted by ASC's team of ERISA experts led by John Griffin, J.D., LL.M. who has over 35 years of industry experience



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