DC/401(k) Valuation & Administration Software

Both web and premise-based systems available. The choice is yours.

BOOST YOUR EFFICIENCY WITH ASC'S DC/401(k) SOFTWARE

- Seamlessly Process Plans: Handle everything from straightforward profit sharing to intricate 401(k) plans with ease using ASC.
- Ensure Consistency: Avoid discrepancies between plan administration and the corresponding plan document.
- Get Fast, Accurate Support: Our Support Team, former administrators who understand your needs and provide precise answers.

PLANS INCLUDE:

- 401(k)
- New Comparability / Cross-Tested
- DB/DC Combo Plans
- Profit Sharing
- ESOP & KSOP
- Money Purchase Pension

THE SYSTEM INCLUDES:

- Comprehensive administration
- Recordkeeping
- Industry-leading compliance testing
- Both web and premises-based systems available

Leverage your workload with ASC's intelligent automation to streamline the processing of plan administration using ASC's DC401K software

IMPROVE YOUR EFFICIENCY WITH INTELLIGENT AUTOMATION:

- Manage all 401(k), Profit Sharing and Money Purchase Plans effortlessly
- Stay fully updated with all legislative changes
- Utilize the full 401(a)(4) Testing / Design Module
- Versatile Reporting: Generate both standard and custom reports via the ASC Report-Writer
- Flexible Eligibility Calculations: Adapt to various eligibility requirements including LTPT with ease
- User-Friendly Data Management: Import/export and edit data effortlessly with intuitive wizards and grids
- Robust Data Validation: Perform comprehensive data checks to ensure accuracy
- DB/DC Combo Reporting: Seamlessly handle combined reporting for Defined Benefit and Defined Contribution plans
- Extensive Group Definitions: Benefit from detailed 401(a)(4) group definitions
- Multiple Funds and Sources: Manage multiple funds and sources with global descriptions efficiently
- Built-In Budget Solving: Utilize routines for new comparability, integrated, age-weighted and sole proprietor/partnership plans
- Employer Contribution Calculations: Accurately calculate various employer contributions for 401(k) and other defined contribution plans
- Extensive Employee Data Validation: Validate employee data in one step, including custom data validation formulas
- Recordkeeping and Compliance: Accommodate controlled groups, MEPs and PEPs with ease.
- Flexible Accounting: Perform accounting in shares or dollars on a fund-by-fund basis and print/export Trust Reconciliation Statement
- Streamlined Integration: Integrate within the ASC suite of systems
- Single-Step Processing Automation: Automate and schedule administrative functions across multiple plans

RECORDKEEPING PARTNERS

ASC's System utilizes intelligent automation to streamline the import of plan data from leading recordkeeping providers. By integrating these financial imports with employer-provided census data, you can efficiently perform the following tasks:

- Combine with outside assets or employer stock and produce a combined employee statement that includes all assets.
- Adjust from cash basis to accrual basis and produce an annual recap with accurate financial adjustments
- Audit the deferrals and match, comparing contributed amounts with calculated amounts to ensure accuracy
- Provide accurate earnings on refunds that are a result of a failed compliance test

SOME OF ASC'S OUTSOURCING PROVIDER LINKS

ascensus · BPAS · Capital Group · American Funds · Empower Retirement · Fidelity Investments · finch · Group IRA · inspira · John Hancock · Lincoln Financial Group · Nationwide · OneAmerica · Payroll Integrations · PensionPro · PenChecks Trust · Schwab Retirement Technologies® · Principal · T. Rowe Price · Transamerica · The Standard · Voya

BALANCE FORWARD RECORDKEEPING

In ASC's traditional balance forward recordkeeping system plan assets can be valued on an annual, semi-annual, quarterly, or monthly basis; tracking monies in a single pooled fund or in multiple funds. Earnings allocation methods, including prior balance and time weighted, can be applied separately to certain funds or groups of participants, either in shares or dollars.

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