Plan Sponsor Connect & CATTS

Simplified Data Collection & Project Management, via ASC's fully hosted, secure web portal

A WEB-BASED ORGANIZATIONAL TOOL BUILT FOR THE RETIREMENT PLAN PROFESSIONAL

A central location for all your data collection, workflows, customizable census & questionnaire, automated emails and more!

PLAN SPONSOR CONNECT AND CATTS COMMUNICATIONS & YEAR END DATA GATHERING

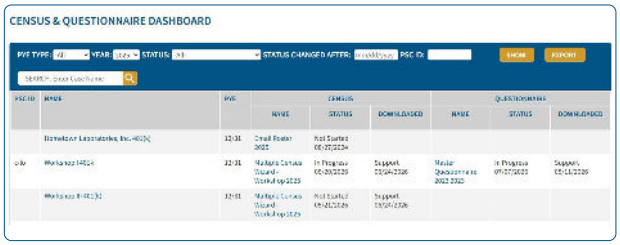
- Batch create customized Forms and store as Rosters for email delivery
- Batch create DGEM Pre-populated Forms and Document packages and store as Rosters for email delivery
- Publish CATTS forms, DGEM Pre-populated Forms and Documents to the Plan Sponsor Connect Web Portal
- Gather Census and Questionnaire year end data with CATTS and the Plan Sponsor Connect Web Portal

EASIER & MORE EFFICIENT DATA COLLECTION FOR TPAS AND PLAN SPONSORS

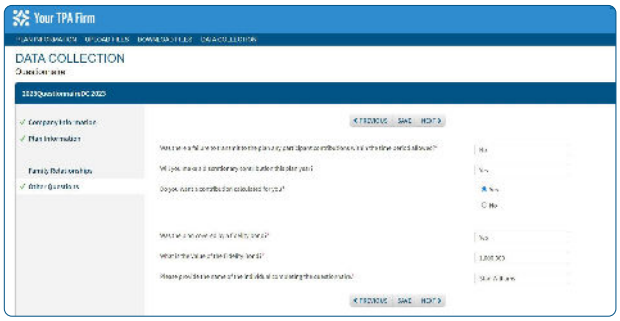
Plan Sponsor Connect features a simple, easy to use interface via a modern, fully hosted, secure web portal.

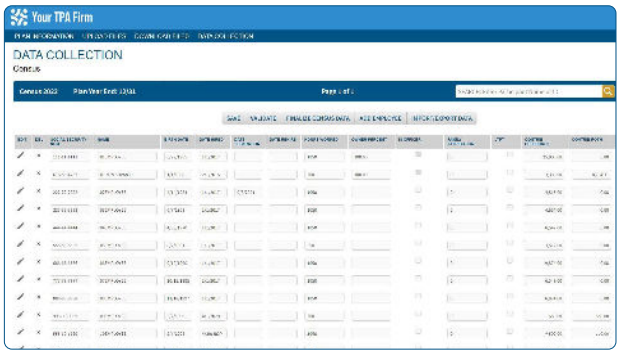
Customizable online questionnaires and census submission with data validation and real time dashboards for status tracking increase your efficiency. Plus you can share and exchange files securely, more. Track progress, send updates, provide important plan related documents, and

- 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
- Wizard for seamless integration between the ASCVal system and Plan Sponsor Connect
- 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!









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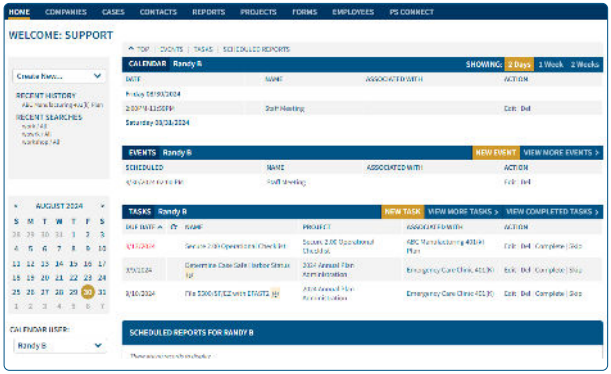
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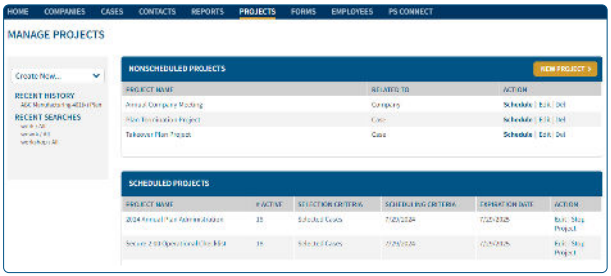
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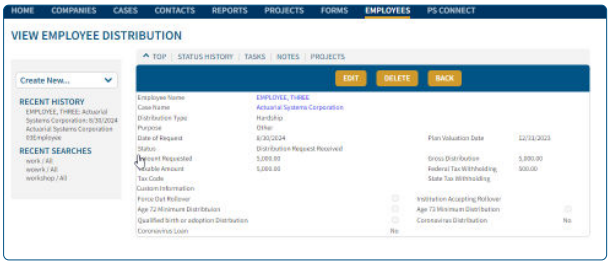
Customizable online questionnaires and census submission with data validation and real time dashboards for status tracking increase your efficiency. Plus you can share and exchange files securely, track progress, send updates, provide important plan related documents, and more.

ORGANIZED AND AUTOMATED

- All in one place: clients, contacts, cases, & participants plus the option to individualize with unlimited custom fields
- At a glance views of your filing deadlines, events, tasks and staff schedules
- Create and generate a variety of reports on demand or create reports to generate and deliver to users on a regular schedule
- Track annual or daily workflow with Case or Company projects and staff role assigned tasks
- Manage case workflow by converting internal checklists to customized project templates or utilize generic project templates







AT-A-GLANCE: SEE THE BIG PICTURE & MONITOR ALL YOUR PLANS!

Integrated within ASC's product suite for "Real Time" data flow between systems, allowing you to see up-to-date and comprehensive status of all your plan sponsor and plan information.

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