



Document Automation Service for the Retirement Plan Industry

A Comprehensive Package to Accelerate High-Volume Plan Document Production and Revision

Retirement plan providers are under greater pressure than ever before. New regulatory requirements such as the Economic Growth Tax Relief Reconciliation Act (EGTRRA) are forcing you to dramatically shift the way you do business, while the unstable economy is prompting more and more of your clients to freeze, terminate, or scale back their plans.

When modifications to internal policies and procedures take place, or when legislative guidelines are introduced, revised, or expanded, numerous plan documents, as well as the ancillary documents that support them, must be immediately amended to reflect those changes.

Additionally, upcoming restatement periods will require you to convert countless existing GUST plan documents into your new EGTRRA environment.

Changes like these are cumbersome and time-consuming. Modifying or amending the hundreds to thousands of plan documents you have in place can seem like an impossible, never-ending task, requiring massive amounts of both time and money.

That's why AccuDraft has developed the new Document Automation Service (DAS), a comprehensive package that combines software and consulting services to empower your organization to accelerate and enhance the way it produces, revises,

and manages a high volume of plan documents. With DAS, you can easily and economically create or modify plan documents in large numbers. As a result, you can instantly respond to dynamic business conditions and emerging requirements without draining human or financial resources.

Built on Today's Most Powerful Document Automation Technologies

With our robust, Web-based plan document automation solution, DocsEngine for Pensions, as its foundation, DAS can enable your company to:

- Rapidly generate massive numbers of new plan documents, without the need for extensive human intervention
- Quickly make amendments or revisions to hundreds - or even thousands - of existing plan documents, in as little as one business day
- Automate the creation, storage, and maintenance of supporting or ancillary documents, such as service agreements, and investment policies
- Seamlessly integrate new or modified documents with other new or existing contracts, systems, and applications across your company
- Gather vital intelligence about your current plans, such as how various changes to terms and conditions will impact client service, operations, or cash flow

At the core of DocsEngine is a unique, cutting-edge rules-based engine that enables the rapid generation and modification of documents based on the

Key Benefits

- ✓ Rapidly generate a high volume of plan documents
- ✓ Instantly revise hundreds – or even thousands – of existing documents
- ✓ Seamlessly integrate plan documents with other contracts, systems, and applications
- ✓ Gather vital, timely plan document intelligence

guidelines and policies that govern your individual retirement plans, and your business as a whole. This approach dramatically reduces the time needed to create a large number of plan documents, while maximizing accuracy and consistency across even the highest volumes. Additionally, it increases the speed of document updates - simple alterations to the rules, based on changing conditions, are all that are needed to immediately initiate bulk changes.

Other powerful DocsEngine features include:

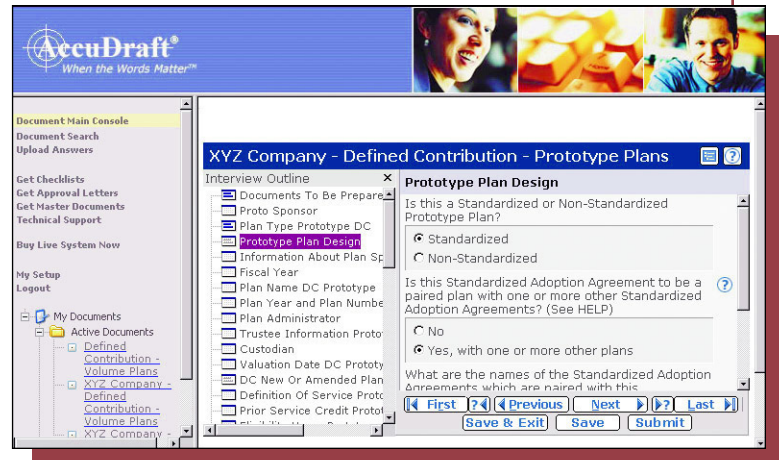
- A Q&A/interview-style interface, combined with pre-developed templates, that automatically insert approved, fully-compliant language into documents. This makes it easy for any user to generate new documents that conform to all standards, or rapidly update existing ones to meet new guidelines.
- A cutting-edge document "mapping" capability that dynamically modifies legacy contracts to adhere to new requirements, so they are consistent with more recently generated documents.
- A comprehensive document repository that provides greater control over revisions, multiple versions, modifications, and amendments.
- Powerful reporting functionality that allows users to instantly identify errors, inaccuracies, and areas of non-compliance by analyzing any document or group of documents based on any element or criteria.

Delivered by Today's Most Skilled and Knowledgeable Professionals

The services included with the Document Automation Service are delivered by consultants who possess deep expertise in the mechanics of document creation and maintenance, as well as thorough understanding of the retirement plan and employee benefits industry. These professionals have a winning combination of experience and education, which allows them to effectively assist our clients with virtually any plan document-related issue, including regulatory compliance and restatements.

Maximum Affordability

And best of all, pricing for the Document Automation Service is budget-friendly for companies of all sizes. Fees are affordable and flexible, and are based on usage/contract volume.



With DocsEngine for Pensions, creation of new plan documents is quick and easy. Users simply complete an online questionnaire. As they enter their responses, specific language is automatically included into the document.

About AccuDraft

AccuDraft is a leading provider of Web-based Contract Lifecycle Management solutions built on unique, leading-edge rules-based capabilities. Since 1992, AccuDraft solutions have helped hundreds of clients – from small organizations to Fortune 500 companies – increase efficiency and reduce costs and risk by transforming the way they create, track, and manage their most critical business documents.

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