



DocsEngine for Pensions

Robust, Rules-Based Pension Document Automation

Key Benefits

- ✓ High-quality plan and ancillary documents
- ✓ Full collaboration and document sharing
- ✓ Sophisticated role-based security
- ✓ Comprehensive document tracking and analysis
- ✓ Dynamic data exchange between plan documents and other business systems
- ✓ Support for specialty plans including HSA plans, UniK plans, and 403b
- ✓ Accelerated ROI

Retirement plans, and the high volume of paperwork required to set up and manage them, can put a tremendous strain on plan providers' limited resources and prevent them from focusing their efforts on customer service and other critical day-to-day plan activities. In an effort to increase efficiency and reduce expenses, many providers have automated the creation of their plan documents. But, most realize only minimal cost and productivity benefits because they continue to rely on time-consuming, error-prone manual processes to generate the other plan-related contracts – such as service agreements, investment policies, and plan amendments.

document activities – dramatically improving productivity and reducing costs, while increasing the accuracy of all your plan-related documents.

With DocsEngine for Pensions, you can eliminate the labor-intensive manual processes that often result in incomplete, inconsistent, and incorrect plan documents and provide your employee benefit professionals with fully-automated, self-service document generation. We convert your custom documents into business rules and publish them to an online portal. Any authorized user can then rapidly and easily create new documents by simply answering a series of questions. As the questions are answered, specific language based on those pre-defined rules is dynamically included, guaranteeing that each document you generate contains the correct information, every time.

DocsEngine for Pensions: Robust, Rules-Based Pension Document Automation

DocsEngine for Pensions from AccuDraft goes far beyond pension document creation. It dynamically automates the entire end-to-end pension document process – from drafting and collaboration, through maintenance and management. Built on AccuDraft's powerful and unique rules-based technology, DocsEngine for Pensions gives you complete and unprecedented control over your pension

And, DocsEngine for Pensions' fully-hosted solution model eliminates the need to purchase or license any software while minimizing IT impact, accelerating implementation, and keeping expenses under control. Additionally, it offers a firewall-friendly Web-based architecture, so any authorized user can easily create plan documents anytime, anywhere – using nothing more than a standard Internet browser.

Support for the Broadest Range of Pension Plan Documents

With DocsEngine for Pensions, providers can create and manage a wide variety of plans and plan-related documents. These documents are recognized by leading law firms, pension professionals, and institutions as some of the most flexible and well-written in the industry.

Volume Submitter:	Prototype:	Other:
401(K) Profit Sharing Money Purchase Defined Benefit Target Benefit	401(K) Profit Sharing Money Purchase Defined Benefit	Cafeteria-Premium Conversion Cafeteria - Medical and Child Care

You can also automate creation of the ancillary documents needed to set up new clients, including transmittal letters, engagement letters, and service agreements, and host them on your system. DocsEngine for Pensions allows you to create these documents at the same time, and using the same questionnaire, as your plan documents.

Additionally, you can create a full document submission package – including plan documents, SPDs, Form 5307, IRS transmittal letters, and administrative forms – for a broad range of plan types such as 401(k), profit sharing, money purchase, and defined benefit.

DocsEngine for Pensions also offers full support for specialty plans including HSA plans, UniK plans, 403b, 457, and others.

A Full-Featured Environment

With DocsEngine for Pensions, you can leverage a set of powerful capabilities that will enable you to:

- Set up client names and associate documents with appropriate clients
- Generate custom documents, such as engagement letters, trust agreements, and service agreements from the same interview questions used to create the plan
- Archive documents that are no longer being worked on, and view a single list divided into active and archived documents

- Perform searches across plans for keywords and provisions, so all documents containing specific criteria can be immediately located
- Make revisions to a single plan, or multiple plans at the same time
- Mark documents with a workflow status from a status list customized to your company's business processes
- View the complete details of any document, including when and by whom it was created, modified, emailed, or had its workflow status last changed
- Email documents to outside parties, and track email transaction history records

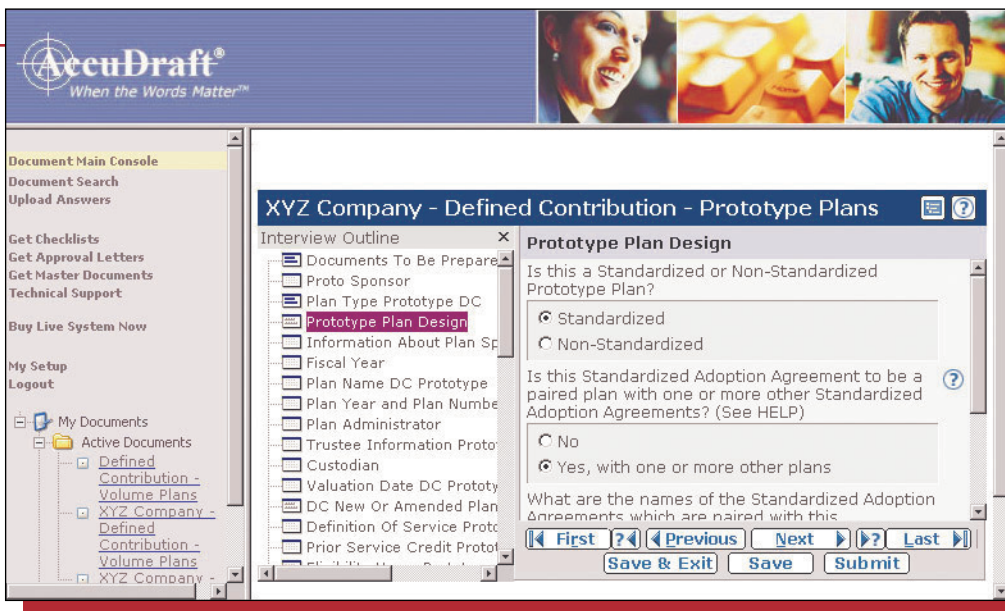
Comprehensive Workflow Tracking

DocsEngine for Pensions makes it easy to monitor the history of any document. Using customized workflow statuses, users can track documents through the various stages of completion — including creation, editing, and emailing.

Easy and Efficient Administration and Security

Since different members of your staff play different roles in the pension process, DocsEngine for Pensions allows you to easily set up and manage role-based user permissions. Your designated administrators can:

- Add new users and edit existing user accounts, to determine who has access to your pension documents
- Assign drafting, re-drafting, viewing, and other rights to each user, so you can control what users can do with your pension content
- Divide users into custom user groups, and give each group access to different content and features
- Create user-defined workflow status lists, and enable users to mark documents with statuses to reflect current activity
- View and monitor the details of all document transactions performed on the system
- Leverage custom content by uploading custom automated templates to our server, allowing us to program custom content for you, or letting us teach your staff to do it



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.

Fully-Integrated with Your Enterprise Systems

DocsEngine for Pensions uses industry-standard XML to store document specifications, so data can be easily passed to other enterprise systems. Additionally, data from other business applications can be used to generate documents.

System Architecture and Requirements

DocsEngine for Pensions uses industry-standard, enterprise-class technologies, including MS SQL Server, XML, Active Server Pages (ASPs), JavaScript, and JavaScript Remote Scripting. The service is hosted, and all documents are stored on distributed servers managed by Rackspace®, connected to an Internet backbone by redundant OC-48 all-fiber-optic connections for maximum efficiency and reliability. This eliminates the need for you to provide document storage, disaster recovery planning, or system backups.

Online questionnaire sessions use JavaScript client-side, eliminating the need to re-connect to servers between questions, and ensuring optimum system performance and corporate firewall compatibility.

Superior Support Services

AccuDraft employs a staff of knowledgeable and experienced ERISA attorneys, enrolled actuaries, and document professionals to

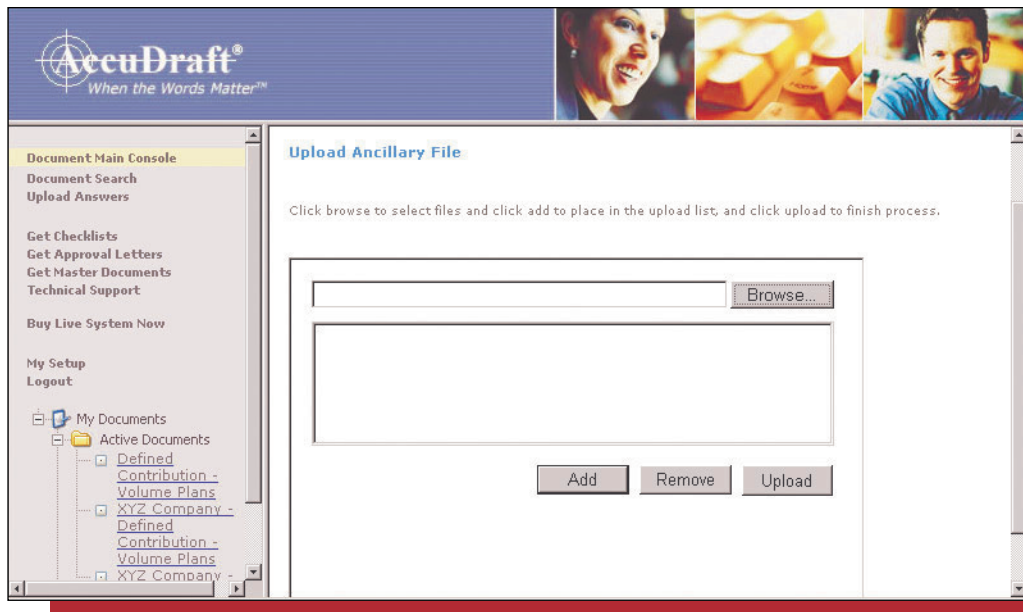
assist you with your pension document processes. Additionally, our technical support staff is available to answer any computer or system-related questions you may have.

An Affordable Solution that Delivers Rapid ROI

DocsEngine for Pensions is designed to deliver value to small and large institutions alike, and offers straightforward pricing based on document volume and number of users, so you pay only for what you use. Extra charges are waived during restatement periods, when document volume is unusually high. And, because DocsEngine for Pensions is a Web-based ASP solution, there are no software, hardware, or technical staff expenditures upfront – which dramatically accelerates your return on investment.

System Requirements:

- Operating System: Windows 98, NT, 2000, or XP
- Word Processing Software: Microsoft Word 2000, XP, or 2003
- Internet Connection: High-speed (T1, DSL, or cable)
- Internet Browser: Microsoft Internet Explorer 5.5 or higher
- Processor Type: Intel Pentium II or greater, or AMD Athlon or greater
- Processor Speed: 1 GHz or faster
- Memory: 128K RAM or greater



DocsEngine for Pensions also allows you to upload existing ancillary documents, and automate the creation of new ancillary documents such as transmittal letters, engagement letters, and service agreements.

Adopt Our Plans

You can also adopt our cost-efficient Volume Submitter or Prototype plans in your firm's name. With each plan, your clients will see your organization's name on every document cover page and/or submission. The Volume Submitter plan will automatically print your company's contact person on the Power of Attorney (POA) form in each document package. And, with the Prototype plans, your firm's name will be placed on each cover page, as well as the POA form.

Adoptable plans include:

- 401(k)
- Money purchase
- Profit sharing
- Defined benefit
- Target benefit



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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