

IT'S TIME TO TAKE YOUR PRODUCTIVITY
& SERVICE TO NEW HEIGHTS

ELEVATE
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PensionProSM



ACCELERATE PRODUCTIVITY

PensionPro enables the onboarding and training of employees exponentially faster than sitting with 'Bill' in operations.



MAINTAIN YOUR SERVICE

Ensure consistent quality across all employees no matter their geography or seniority. PensionPro project templates create scalable workflows and detailed checklists.



SECURITY AND CONTROL

At PensionPro, we understand data security is mission critical, which is why we designed our secure file transfer portal with TPAs in mind. With our secure portal, collecting employee census data is consolidated to one secure location where you can easily share files, track client progress and send them reminders.

Elevate Operational Efficiency



MANAGE YOUR TEAM

View the status of outstanding work at the employee, team and account level. Our dashboards and reports make running your business more efficient.



FILL YOUR PIPELINE

Stay on top of prospecting with our proposal tracking tool that not only keeps your network organized and tracks interactions but also seamlessly integrates accepted proposals into your administrative process to get your team started on the work.



DEMONSTRATE THOUGHT LEADERSHIP

Receive a quarterly newsletter with your firm's branding in your inbox which you can distribute to your clients and partners to keep them informed on the latest retirement industry news and trends.

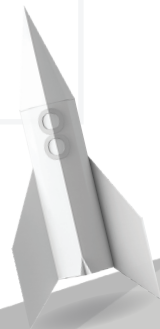


MULTI-PAGE WEBSITE

Ready for a mobile-optimized professional site? Our multi-page sites are perfect for firms ready to utilize their web presence as a fully functioning prospect and client hub. Your website is the first stop for all new prospective clients. Benefit Insights is a TPA-specific, full-service, website partner. Get started today.

FEATURES

- Web Hosting
- Domain Name Setup
- Multiple Layout Choices
- SSL — Enhanced Security
- Automatic Plan Limit Update
- Analytics
- Optional Enhancements (Additional Cost)



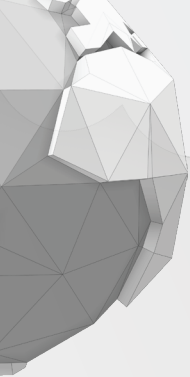
Determine Your Trajectory

Whether you're only interested in a CRM or you're ready to optimize your entire business, PensionPro has a tier that meets your needs. Get started quickly using TRACK, by deploying TEAM to expedite annual administration, and implementing BUSINESS to watch your firm grow faster.



FEATURE	TRACK	TEAM	BUSINESS
Client, Plan and Contacts Centralize client, plan and contact information for full access to your data	✓	✓	✓
Plan Cycle Milestone Dashboard Track your milestones and deadlines	✓	✓	✓
Standard Reporting Access your data with 50+ reports	✓	✓	✓
Secure File Exchange Send and receive sensitive information quickly and securely	✓	✓	✓
Time Tracking Track profitability and productivity		✓	✓
ftwilliam.com Integration Forms, Compliance and Documents Software		✓	✓
Blast Email Send targeted emails to clients, contacts and prospects		✓	✓
Fee Schedules Templated and customizable fee schedule tracking		✓	✓
To-Dos Don't forget to make a phone call or schedule a meeting again		✓	✓
Document Specifications Store your document specs for easy access		✓	✓

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FEATURE	TRACK	TEAM	BUSINESS
Communication Lists Group your contacts for easy blast emailing		✓	✓
Email Notifications Receive notifications when work assignments are made or become active		✓	✓
Interactions Log phone calls, meetings and emails for your contacts		✓	✓
Online Data Collection Collect annual census data securely via PlanSponsorLink		✓	✓
Payroll Integrations Integrates with the TPA Connect Platform		✓	✓
Workflow Set up projects and tasks that flow between employees			✓
Project Dashboards See what tasks need to be done at a glance			✓
Worktrays Assign work to teams within your office			✓
Distributions Automate distributions and export data for easy 1099 prep			✓
Fetch Create, store and share custom queries to access your data			✓
Event Management Track due dates and remaining work to be completed for approaching deadlines			✓
Single Sign On (SSO) Integrate accounts seamlessly with your identity authority			✓
Merge Documents Use Word to build and customize merged documents			✓
API Connect your data to our system from nearly anything			✓
IP Address Control Control which IP addresses can connect to your instance			✓
Status Automations Automatically update customer-facing status of processes on PlanSponsorLink			✓

The PensionPro logo is centered on a green background with a cloud-like pattern. The word "PensionPro" is in a white, sans-serif font, with a small "SM" trademark symbol to the right of "Pro".

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VISIT [PENSIONPRO.COM](https://pensionpro.com)
TO FIND YOUR LAUNCHPAD