

RELIUS DOCUMENTS

SunGard's Relius Documents is a combination of application service provider (ASP) software and multiple resources designed to serve as your comprehensive, best-fit document generation system for retirement plans, cafeteria plans, and self-funded health plans. With Relius Documents, you can produce IRS-compliant plan documents and supporting forms packages, including adoption agreements and summary plan descriptions. The system's content is written by Relius' nationally recognized employee benefits attorneys, who continually update the document language to comply with industry legislation and trends.

The Relius Documents solution helps save you time by providing you with accurate and compliant plan documentation. Yet the system is also flexible enough to allow you to customize your documents to suit your specific business needs.

Relius Documents can help you produce 401(k), profit sharing, money purchase, target benefit and defined benefit prototype plans, volume submitter plans and individually designed plans with summary plan descriptions and administrative forms. The Relius Documents system can also be used to produce IDP ESOP-stock bonus, IDP defined benefit/cash balance, 403(b) plans, cafeteria plans and self-funded plans.

You can access the Relius Documents system from any computer via Internet Explorer® or Firefox™. You can process numerous documents via subscription or "surf up" to produce an occasional one via the On Demand service.

As a hosted application, Relius Documents helps save you the time normally spent on installing software and performing updates, and it helps reduce costs involved in maintaining and updating hardware. SunGard performs system back-up services and provides operational redundancy for business continuity, helping to assure your information is both accessible and safe.

NEWER OFFERINGS

Relius Connect for Documents — You can use Relius Connect for Documents' Web services to automate many of your current processes. Use a Web front-end or any other application to automatically feed or receive Relius Documents data, set up new plans, update existing plan checklists, share Relius Documents data with any of your proprietary systems, and request documents for delivery to e-mail or FTP — all without ever logging into your RD ASP system. If you do not have the programming know-how or resources readily available in your organization, SunGard can develop a customized and automated data collection/document generation solution for you.

Checklist Entry — A new, Web browser-based application, Checklist Entry is packed with new features to help make your data entry process more efficient. Enhancements include an unanswered questions indicator in the tree view, "unanswered questions only" checklist print option, copy and paste functionality, and explanations about disabled questions or responses.

Employer Requested Amendment Processing — This module's capability allows you to change any checklist response and update your plan checklist file automatically, either immediately or upon the assignment of a certain status (*i.e.*, client signed). Choose any combination of documents to include in the generated amendment package, such as the amendment, SMM, adopting resolution and cover letter, along with a completely new adoption agreement or summary plan description (SPD).

Key Software Features and Benefits

- » Provides IRS-compliant plan documents, including prototype and volume submitter plans
- » Provides summary plan descriptions and forms that coordinate with the plan
- » Allows documents to be customized to suit specific business needs
- » Helps reduce cost and time commitment
- » Offers SunGard's Mass Submitter status to help lead to lower IRS fees
- » Helps save time involved in researching and drafting plan documentation
- » Links to Relius Administration and Relius Government Forms

Multi-Doc Processing — This module allows you to batch build or validate any number of plan document packages at one time. All plans that require an annual notice can be identified quickly, such as Safe Harbor, EACA, QACA, SIMPLE or QDIA, and a customized annual notice package can be generated for each of the plans in the batch. Couple this module with the Reporting feature, and you can batch process documents based on the results of the queries you create.

Project Archive and Restore — This module helps if you have a large number of terminated or outdated plans cluttering up your system, but are not sure if you want to delete them entirely. The archive feature allows you to remove any number of projects from view throughout your system with the option to easily restore them at any time if necessary.

VALUE-ADDED RESOURCE ACCESS

In addition to the software solution offered, Relius Documents has other resources available to you, including:

Document Management Services (DMS) — DMS is a plan outsourcing service for firms with 300 or more plans that produces plan documents and amendments, including restatements. It becomes your “back-office” and helps save you time, money and compliance headaches.

Service Bureau — Designed as a document generation service for employee benefit practitioners who want to leave the processing to someone else, but do not have the volume to use DMS, the Service Bureau helps ensure consistency and accuracy among all of the documents you produce.

Other Plan Documents — In addition to the documents above, non-qualified deferred compensation documents (409A), 457, nonqualified, IRA, health plan “wrap” documents, and HRA documents are offered via CD and a subscription for updates.

Document Amendments — Relius provides IRS required amendments that help save time and resources on research and drafting. Not limited to Relius plan types, these amendment and forms packages help enhance your plan documents with the latest regulatory language.

Pamphlets — Relius Education Communication Pamphlets contain frequently asked questions (FAQs) on industry hot topics, helping save you research time and resources. Written by nationally known pension experts, various topics are available and customizable with your company name and logo — helping promote you as the expert.

You can create any type of document using SunGard’s Relius Documents ASP system. SunGard works with you to create a simplified questionnaire with the appropriate built-in logic, and associated proper language, to create your final documents — proposals, policies, agreements, manuals, and more. A single questionnaire can create multiple documents. By helping to eliminate redundant data entry, you can automate your document preparation, create reports and use the data to import into other systems.

Whether your business is large or small, SunGard’s Relius Documents solution can be employed to fulfill your specific needs. To learn more about Relius Documents and SunGard’s broad range of benefit administration solutions, visit Relius Documents online or call 1-800-326-7235, option 5.