

XTRAC® for Third Party Administrators & Retirement Plan Record-Keepers

WORK SMARTER. WORK FASTER. BE MORE PRODUCTIVE.

Third Party Administrators (TPAs) and Retirement Plan Record-Keepers are challenged to keep pace with regulatory changes, manage paperwork and increase service capacity.

You may be grappling with numerous administrative tasks that are holding you back from understanding your true cost to serve and efficiently managing growth. The fact is, many TPAs and Record-Keepers still use outdated methods to process work, which results in unnecessary inefficiencies, costs and risks. XTRAC® can help.

XTRAC workflow and document management applications provide an easy, affordable way for TPAs and Record-Keepers to automate, track and control how work gets done across their organization. With XTRAC, record-keeping and retirement plan processes are streamlined, standardized and compliant, and you have better visibility over end-to-end operations. Your firm is able to do much more, and do it better, allowing you to service larger plans and attract new plan sponsor relationships.

BENEFITS FOR TPAs & RECORD-KEEPERS:

- Faster transaction time
- Full transparency
- Lower costs
- Reduced regulatory risk
- Improved scalability
- Increased client satisfaction

WORKFLOW PACKS for TPAs and Record-Keepers

Built and used by Fidelity Investments, one of the largest retirement plan providers, XTRAC understands the unique needs of TPAs and Record-Keepers and provides a comprehensive range of ready-to-use process solutions specifically designed for your business.

Client Servicing

- Participant Account Maintenance
- Plan Maintenance
- Death Notification
- Non-Qualified Elections

Transactions

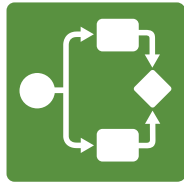
- Participant Enrollment
- Contributions
- Distributions including MRD
- Loans

Risk & Compliance

- Quality Review
- Nondiscrimination Testing
- 5500 Reports
- Audit Support & Inquiries

PROVEN PROCESSES. **SIMPLY DELIVERED.**

XTRAC provides TPAs and Record-Keepers with an industrial-strength – and yet easily accessible – workflow solution to be more efficient, get control and grow.



Workflow
Automation



Hosted
Document
Management



Insights
& Analytics

Comprehensive Solution

XTRAC is a robust workflow solution that includes Workflow Automation, Hosted Document Management, and Insights & Analytics. It provides tracking, routing and control of work across employees, departments and offices. XTRAC integrates with front-end applications, record-keeping and financial systems for a seamlessly connected organization.

Expertise Built In

With XTRAC, TPAs and Record-Keepers can access the very same engine that Fidelity Investments, a global financial services leader, uses to manage its own business processes every day. Our experience and expertise in managing mission-critical processes is available to help power your business too.

Fast, Easy and Cost-Effective to Deploy

XTRAC is simply delivered as an affordable, cloud-based service – there is no costly software or hardware to buy, install or maintain. You can be up and running quickly and scale as needed.

Highly Secure and Reliable Cloud

XTRAC provides an unsurpassed level of data security, disaster recovery and availability to its clients through a highly secure cloud environment. XTRAC is fully supported by the comprehensive state-of-the-art data and physical system security, application availability and system redundancy standards of Fidelity Investments.

*To learn more about how XTRAC can help Third Party Administrators and Retirement Plan Record-Keepers streamline and gain greater control over their business, please contact us at sales@xtracsolutions.com or **855-WRK-FLOW**.*

About XTRAC Solutions

XTRAC Solutions, an independently operated Fidelity Investments company, provides workflow automation and document management. With its solutions used extensively across Fidelity and by many other companies, XTRAC has over 20 years of industry experience managing complex, mission-critical processes that support thousands of users and millions of work items annually. XTRAC delivers excellence in business results and customer satisfaction for all its global clients.

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