



Year End Data Collection

Retirement Solutions | Data Collection

Automated Year-end Data Collection for Retirement Plan Professionals

Once a very manual and cumbersome process between plan sponsors, the Relius Year End Data Collection (YEDC) solution from FIS™ simplifies the data collection process and allows you to securely collaborate with plan sponsors in real time to collect and confirm year-end information for annual compliance testing, contribution allocations and completion of Form 5500.

Create easy to follow wizards with detailed questionnaires, built-in instructions, and automatic notification to both you and the plan sponsor. As the plan sponsor reviews and signs off on the process, results are stored for easy access from multiple locations, including directly within Relius Administration.

Solve the burdensome and time-consuming process for both TPAs and plan sponsors

Benefits of this highly configurable application include the ability to:

- Create customizable YEDC consisting of plan level questionnaires, instructions and notifications
- Prefill questionnaires and census with data from Relius Administration
- Establish contact access to YEDC
- Publish YEDC for plan sponsor review
- Validate YEDC payroll against year-to-date payroll for discrepancies
- Update and review information completed as part of YEDC directly in Relius Administration

The Relius YEDC solution from FIS is a highly configurable application that enables plan service providers to easily collect and review year-end data

Effectively Manage the Time-consuming Process of the Year-end Data Collection

Customers who are licensed for Relius Administration, Relius Documents and Relius Government Forms can provide plan sponsors a single branded website to more effectively complete the year-end data collection process, review plan documents and electronically sign and file 5500s. Access to the solution is available from either Plan Sponsor Web or Relius Exchange.

Single sign-on access

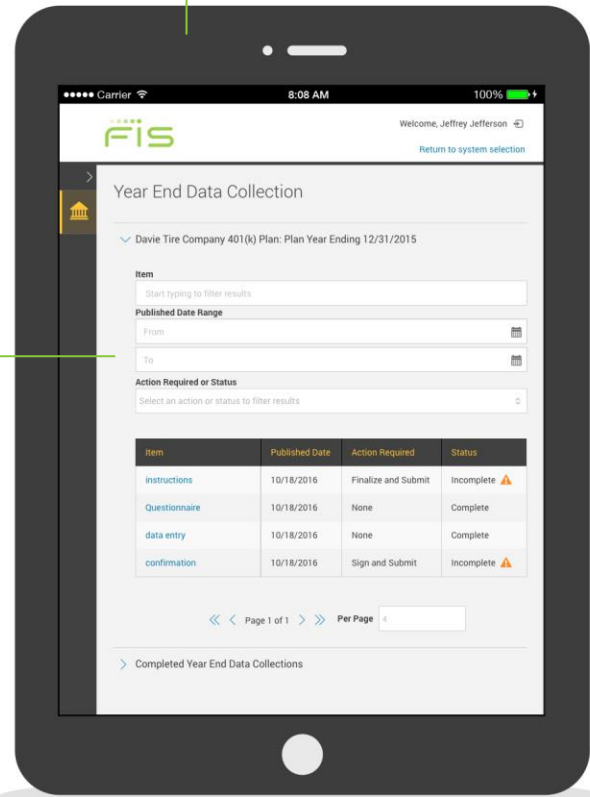
Increase the integration with your corporate website by providing single sign-on access to the plan sponsor – reducing the need to manage multiple logins and passwords.

Sign Up Today!

Year-end will be here before you know it. Be prepared with a solution that allows you to engage with your plan sponsors to streamline and minimize the time-consuming process of managing the year-end data collection process with Relius' YEDC solution.

Responsive design allows for easier use on tablet as well as desktop browsers

Retractable navigation adds additional viewing area



About FIS Wealth and Retirement

FIS provides wealth management and retirement technology and services that help banks, trust companies, brokerage firms, retirement plan administrators and advisors accelerate asset growth and optimize operations to achieve better outcomes for the end investor. We provide solutions for client acquisition and communication, transaction management, risk and compliance, portfolio accounting, plan administration and reporting that can be deployed as stand-alone products, part of a unified platform, or outsourced services.

Enabling the Adaptive Enterprise

Sitting at the intersection of technology and finance, FIS is focused on delivering fresh ideas and inventive solutions to help our customers adapt and thrive in an ever changing environment. With a blend of software solutions, cloud infrastructure, global service capabilities and deep domain expertise, FIS is capable of supporting virtually every type of financial organization, including the largest and most complex institutions in the world. For more information, please visit www.fisglobal.com.