



Tinsley Administrative Solutions
"Solutions You Can Trust"

ANA V. TINSLEY

Ana V. Tinsley, President and CEO of TAS, began with a bachelor's degree in math, along with, a minor in business administration. She compiled an additional 14 years of pension plan administration experience with the actuarial firm of Rudd and Wisdom, Inc. Most recently, she spent three and a half years, serving the needs of many thousands of participants in, hundreds of public defined benefit pension plans, in her role as Benefits Director for the State of Texas, Fire Fighters Pension Commission. Ana was born and raised in a small town West Texas farm community. She is fluent in Spanish and eager to work with Spanish speaking participants. This combined experience not only gives Ana unique insight into the daily needs and challenges that plan sponsors face but, allows her to know and understand the needs of your participants.

ABOUT TAS

Tinsley Administrative Solutions (TAS) is a privately held company with a dedicated, educated, and highly experienced staff, led by Ana V. Tinsley. We have the experience and know-how to meet all of your administrative needs. You can rest easy knowing you will always be in compliance with state and federal reporting requirements. Your members will have full access to Ana and all of our staff, along with access to a wide array of web-based tools. Checking current benefit status or getting future benefit estimates will be simply a mouse click away. TAS will be the point of contact for your Custodial bank, Actuarial entity, and all local, state, and federal governing bodies. We will provide benefit calculations, Domestic Relations Order (DRO) calculations and preparation, calculate and supervise all benefit disbursements, maintain accurate member records and much much more. When you have questions, TAS will have the answers.

Se Habla Espanol!!

ONE SIZE DOES NOT FIT ALL!

The professionals, at Tinsley Administrative Solutions, understand that the size and complexity of defined benefit pension plans are many. While, comprehensive plan administration and full internet portal capability is, exactly what many plan sponsors need and desire, it may not fit for others. Setting up your plan on the TAS internet portal will be an absolute game changing solution for those that choose to keep their administration in house. To try and meet the varying needs of plan sponsors, TAS has developed three tiers of service.

Tier 1- TAS comprehensive administration solutions, bundled with the TAS Internet Portal. This is as full service as you can get. You will find, outlined, further in this document, the services you can expect when you retain TAS to be the solution to your administration needs. This will be coupled with enrollment in the TAS Internet Portal. Please review further in this document a detailed description of our internet portal and the amazing web tools that will be available to plan sponsors and participants alike!

Tier 2- We are going to offer our amazing TAS Internet Portal to those that desire the absolute Cadillac of pension plan administration software, but have no need or desire to outsource their plan administration. We can have your plan coded into our system and up and running in a matter of days as opposed to months. We will, of course, supply all the IT support you will need with this option. Again, a detailed description of what you can expect from the TAS Internet Portal can be found further in this document.

Tier 3- Task Specific solutions. TAS is willing to perform any administration need that you may have, on a task specific basis. We feel sure that we can accomplish these at a far more reasonable rate than you may now be paying your service providers

Bundling TAS Comprehensive Administration Services with TAS Internet Portal will give Plan Sponsors the best ONE-TWO punch in the business!

FULL SERVICE PLAN ADMINISTRATION

ADMINISTRATION FEATURES

AS FULL SERVICE PLAN ADMINISTRATOR, TINSLEY ADMINISTRATIVE SOLUTIONS WILL SERVE AS LIAISON AND PRIMARY PERSON OF CONTACT FOR:

- All plan participants, retirees and their beneficiaries
- All governing entities: State, Local and Federal
- We will maintain communication and handle all coordination with, the plan custodial Bank, plan actuaries, investment consultants, Auditors, Managers, and Legal Counsel
- Will work hand in hand with the plan sponsors to meet all needs possible of plan participants
- We will be readily available to consult with, and supply information to, the plan sponsors about any and all business related to the plan
- If you have a question, we will have the answer, or make it our top priority to find it

AS FULL SERVICE ADMINISTRATOR, TINSLEY ADMINISTRATION SOLUTIONS WILL:

- Generate data for the actuarial studies
- Generate annual benefit statements
- Manage benefit payments and adjustments
- Create benefit estimates, orientation packets, templates, forms, etc.
- Handle DRO perpetration, monitor and implement law changes to plan document
- Create and maintain policies and procedures set forth by plan sponsors

ADMINISTRATION FEATURES CONTINUED

TAS WILL MAINTAIN PERSONNEL RECORDS OF PARTICIPANTS:

- Historical and Current information for benefit calculations
- Participant status reconciliation for actuarial, and audit purposes
- Benefit forms of all retirees, DROs, and beneficiaries
- Ongoing backup of all records
- Maintain confidentiality of participant's records

TAS WILL:

- Prepare Benefits for Participants
- Provide guidance and assistance to all questions and information requested
- Determine if participant is eligible for benefits before processing
- Verify Contribution Reconciliation of Participants
- Verify Distribution Reconciliation of Benefits
- Verify Salary history
- Verify Service per Participants
- Coordinate all data with governing entity
- Coordinate and collect forms required to process request for benefits
- Review paperwork with Participants
- Provide final paperwork to Plan Sponsor for final approval
- Monitor and Process benefits and contributions with Custodial Bank
- Determine taxable, non-taxable, and prorated portion of benefits
- Calculate and make adjustments to any changes to benefits due to law changes

ADMINISTRATION FEATURES CONTINUED

TAS WILL MAINTAIN AND/OR MONITOR MONTHLY, QUARTERLY, OR ANNUAL REPORTS FOR:

- Contributions
- Number of Benefits Paid
- Amount of Benefits Paid
- Expenses Paid
- Rate of Return
- Custodial Bank on accurate information of Participants addresses, tax withholding election, direct deposits, and status changes
- Review and reconcile monthly and annual financial statements from Custodial Bank
- Budget

TAS WILL MAINTAIN REPORTS REQUIRED FOR COMPLIANCE:

- Compile reports to provide:
 - data to actuaries for special studies and actuarial valuations
 - data to external auditors for annual audit or financial statements
 - data to State Pension Review Board
- Monitor:
 - service contracts
 - investment transaction confirmations
 - service provider's compensation
- Provide reports to Plan Sponsor from investment performance
- Provide monthly correspondence from investment managers and consultants

ADMINISTRATION FEATURES CONTINUED

TAS MAY PERFORM OTHER DUTIES AND RESPONSIBILITIES FOR THE PLAN SPONSOR:

- Compile agendas and minutes for legal review
- Post and distribute agendas
- Attend board meetings as requested by the Plan Sponsors
- Make presentations as requested by the Plan Sponsors
- Maintain calendar of events and more
- Assist with Plan Sponsors elections
- Monitor legislative changes to federal, state and local laws impacting the pension plan

TINSLEY ADMINISTRATION SOLUTIONS INTERNET PORTAL

INTRODUCTION

The TAS Internet Portal is a game changing solution for defined benefit pension plan administration. This application offers both plan sponsors and participants a comprehensive tool for viewing, managing and storing all pension plan related information.

The design of the portal is simple and user-friendly, so that both plan participants and plan sponsors alike can use it easily and with minimum effort. It allows you to coordinate plan administration activities across any number of departments and locations, while simultaneously providing your participants instant access to their benefit information.

PORTAL FEATURES

REAL-TIME PARTICIPANT BENEFIT ESTIMATES

Plan participants can calculate pension estimates at their convenience, under scenarios that they specify using real-time payroll data.

SIMPLIFIED PENSION ADMINISTRATION

Participants can initiate a retirement request electronically, as well as securely upload documents. Our Worktrack system guides the retirement process from benefit calculation through payment authorization.

CONFIGURABLE DATA ACCESS

Pension data can be viewed and edited by both participants and/or plan sponsors. Access rights are configurable down to the individual data element.

PAPERLESS DOCUMENTS

Go Green! Pension, and other related documents, can be scanned into the system to then be viewed by both participants and/or plan sponsors within the portal. Access to each document is customizable, restricting viewing to certain individuals. All documents generated by the system can be stored electronically.

REAL-TIME PARTICIPANT REPORTS

As plan administrator, we can create listings that give real-time summaries of the pension data. As edits to the data are made, the changes will automatically be reflected in these custom reports.

PORTAL FEATURES CONTINUED

ONLINE NEWSFEED AND COMMUNICATION

Using our portal's Newsfeed, we as plan administrator can send electronic communications with participants concerning pension information, providing yet another means of reducing the amount of paperwork sent out to participants.

SECURE PORTAL

Our web portal is a Software as a Service (SaaS) solution. All that is required to access the system is an internet-connected device, such as a personal computer or tablet using a compatible internet browser. No additional hardware or software purchases are necessary. Our portal uses SSL encryption to secure data transmissions and follows internet security best practices.

SELF SERVICE SECURITY ADMINISTRATION

Participants have the ability to perform common security tasks such as resetting their password and recovery of forgotten User IDs, reducing the burden to the Plan Sponsors.

COMPREHENSIVE RETIREMENT PLANNING

- Ability to calculate estimated benefits
- Can project both defined benefit pensions and defined contribution balances using payroll feed data and personalized scenarios
- Can initiate request for final benefits from the portal

PORTAL FEATURES CONTINUED

DOCUMENT ARCHIVE

- Store PDF files, Microsoft Word, or Excel documents for a participant
- All system-generated documents can be stored automatically (e.g., statements, forms, etc.)
- Related participant documentation can also be stored (e.g., QDROs, birth certificates)
- View access to participant documentation can be customized

REAL-TIME PARTICIPANT DATA

- Data view access tailored by Plan Administrator
- Can allow for selected data editing
- Industry standard security protocol for self-service password resets (i.e., email address, beneficiary info, etc.)

AUTOMATED PLAN ADMINISTRATION

- Easily produce custom benefit displays and generate election forms
- Worktrack provides a checklist for the entire benefit initiation process
- Checklist can be individually designed to conform to current process
- Email notifications can be associated with any step of the process