

'ALLOW THE PROFESSIONALS AT TINSLEY ADMINISTRATIVE SOLUTIONS, TO BE YOUR SOLUTION'



Tinsley Administrative Solutions  
*"Solutions You Can Trust"*

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**The Tinsley Administrative Solutions, LLC**

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## **Biography**

*Ana Tinsley, President and CEO of TAS, began with a BS in Mathematics, along with, an Associates in business administration. She compiled an additional 14 years of pension plan administration experience with the actuarial firm of Rudd and Wisdom, Inc. in Austin, TX, and 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. In the 84th Legislature, she served as the Assistant Committee Director for the Emerging Issues in Texas Law Enforcement under Representative Allen Fletcher. 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. Additionally, Ana has acquired the General License in life, health, and accident care from the Texas Department of Insurance and works as a Partner with Wealth Heritage Group, LLP specializing in annuity rollovers, living benefits, alternative tax-free retirement planning, medicare, and Final Expense. Ana and her husband, Charles, and their two sons, Zach and Carter, make their home in the Williamson County, TX area.*

## **ABOUT TAS**

*Tinsley Administrative Solutions (TAS) is a privately held company with a dedicated, educated, and highly experienced staff, led by Ana 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 a wide array of web-based tools and other life changing solutions for participants and their families. Checking current benefit status or getting future benefit estimates will be simply a mouse click away. TAS may be the point of contact for your Custodial bank, Actuarial entity, service providers, and all local, state, and federal governing bodies. TAS may 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.***

*The professionals, at Tinsley Administrative Solutions, understand that the size and complexity of 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. Having first hand administration solutions from TAS will be a life changing arrangement not only to your pension plan administration needs but to all other administration needs. To try and meet the varying needs of plan sponsors, TAS has developed four main tiers of service and are happy to announce that two additional tiers of services are now being provided as we have acquired a partnership with Wealth Heritage Group, LLP, see new Tiers added below.*

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## **TIERS**

**Tier 1-** TAS comprehensive administration solutions, bundled with the TAS Internet Portal. This is as full service 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 offer our amazing TAS Internet Portal to those that desire the pension plan administration software, but have minimal need for pension plan administration. We can have your plan coded into our system and up and running in a matter of weeks 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-** We offer In house Licensing of the Internet Portal to those that desire to host the license in house and TAS would provide comprehensive database and web support to plan administrators, plan sponsors, and/or board of trustees.

**Tier 4-** Task Specific Solutions. TAS is willing to perform any pension plan 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.

**Tier 5-** Other Solutions:- Provide services as Wealth Heritage Group, LLP for group life insurance, and group health insurance for Public and Private entities. WHG work hand and hand with carriers to provide services.

**Tier 6-** And More:- Provide services as Wealth Heritage Group, LLP for Medicare, Rollovers, and Final Expense needs for members. WHG work hand and hand with carriers to provide services.

## **TAS COMPREHENSIVE ADMINISTRATIVE SOLUTIONS**

### ***TAS 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
- We will work hand in hand with the plan sponsors to meet all needs possible of plan participants
- If you have a question, we will have the answer, or make it our top priority to find it

### ***TAS will:***

- Generate data for the actuary
- Generate annual benefit statements
- Manage benefit payments and adjustments
- Generate benefit estimates
- Maintain policies and procedures set forth by plan sponsors
- Provide orientation packets for new plan sponsors
- Monitor and implement all updates and changes necessary to plan document
- Monitor personnel records of participants via portal
- Maintain historical and current information for benefit calculations via portal
- Maintain participant status reconciliation for actuarial, and audit purposes
- Generate benefit forms of all retirees, DROs, and beneficiaries
- Maintain confidentiality of participant's records

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## **TAS COMPREHENSIVE ADMINISTRATIVE SOLUTIONS CONTINUED**

### ***TAS will:***

- Generate benefit statements annually for participants via portal
- Provide guidance and assistance to all questions and information requested
- Determine if participant is eligible for benefits before processing
- Generate contribution reconciliation of participants via portal
- Generate distribution reconciliation of benefits via portal
- Verify salary history via portal against payroll
- Verify service per participants via portal against plan sponsor
- Coordinate all data with governing entity (the city)
- Coordinate forms required to process request for benefits
- Review paperwork with participants
- Provide final paperwork to Board of Trustees 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
- Prepare Domestic Relation Orders paperwork for legal review

### ***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
- Review and reconcile monthly and annual financial statements from Custodial Bank

## **TAS COMPREHENSIVE ADMINISTRATIVE SOLUTIONS CONTINUED**

### ***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
- Maintain Policy and Procedure updates and distribute accordingly

### ***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 Board of Trustee elections
- Monitor legislative changes to federal, state and local laws impacting the pension plan

## TAS INTERNET PORTAL

### Introduction

*The **TAS Internet Portal** is a game changing solution for pension plan administration. This application offers both plan sponsors and participants a comprehensive tool for calculating, viewing, managing and storing all pension plan related information, “A ONE STOP SHOP” for your pension needs and more.*

*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.*



## **TAS INTERNET 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.

### ***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.

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## **TAS INTERNET PORTAL FEATURES CONTINUED**

### ***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 HR department or call center.

### ***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

### ***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.)

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## TAS INTERNET PORTAL FEATURES CONTINUED

### *Automated Plan Administration*

- Easily produce custom benefit displays and generate election forms
- Work-track 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

### *Main Data to be Obtained for Set up:*

- All Participant data profile as of date of hire
- All participant salaries
- All participant contributions and District contributions
- All Valuation Reports
- Benefit Plan Summaries
- All plan documents and amendments to plan
- All cost studies
- All Financial Statements
- All policies and procedures

### *Set up Service Includes:*

- Uploading participant profiles
- Uploading participant salaries
- Uploading participant contributions
- Uploading participant documents (i.e. refund of contributions, benefit election forms, QDRO's, etc.)
- Uploading Pension Plan documents (i.e. plan document, valuations, cost studies, policies, etc.)
- Uploading inventory of data stored
- Production of Benefit Estimate form template

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## **TAS INTERNET PORTAL FEATURES CONTINUED**

### ***Set up Service continued:***

- Production of Benefit Statement form template
- Production of Beneficiary form template
- Production of Benefit Election form template
- Production of Refund of Contribution form template

## **IN HOUSE LICENSING OF THE INTERNET PORTAL**

**Reference the TAS INTERNET PORTAL FEATURES ABOVE, however clients would have everything set up by TAS and thereafter, TAS would provide comprehensive database support and web support as needed by plan sponsor.,**