

MARC Pension Administration System Services

Tailored to Meet Your Needs



SERVICE	FULL SYSTEM
Participant Website	
Participant can view their data	✓
Participant can do on-demand benefit estimates	✓
Participant can perform Social Security and Defined Contribution projection estimates	✓
Participant can use total family retirement income estimator (including other retirement and spouse retirement income)	✓
Participant can view & download documents, including beneficiary designation forms, SPDs, required notices, etc.	✓
Participant Self-Service features including ability to change contact information, beneficiaries, retiree information	✓
Participant can fill out a form to send a message to the Plan Administrator	✓
Milliman website maintains participant login information and provides users with Forgot Username/Password options	✓
Recordkeeping	
Pension Data Storage	✓
Eligibility Tracking	✓
Vesting Tracking	✓
Beneficiary Storage	✓
Alternate Payee Storage	✓
Cash Balance/EE Contributions/DROP Data Storage & Administration	✓
Document Storage	✓
Ongoing Payroll imports	✓
On demand exports of any data field stored in the system	✓
Valuation Data extract for Actuary	✓
Historical Salary, service, and status reports	✓

SERVICE	FULL SYSTEM
Calculations that Plan Sponsor Can Run	
Early, Normal, & Late Retirement benefits	✓
Benefit estimate calculations	✓
COLA increase/DROP calculations	✓
Cash Balance/Employee contribution calculations	✓
Calculations involving Death, Disability or QDROs [^]	
[^] Available for an additional fee	
Benefit Payment Services	
Retiree data maintenance	✓
Beneficiary records/tracking	✓
Direct-deposit services	✓
Tax withholding tracking	✓
COLA Increase tracking	✓
Monthly data file showing new/changed benefit payments	✓
Participant Communications	
Termination and retirement paperwork	✓
Benefit statements	✓
On-demand benefit estimates	✓
Milliman Security	
Annual SOC 1 and SOC 2 audit performed on the system	✓
High level internet security for Milliman hosted system	✓
Client data hosted on secure off-site server (separate from all other Milliman servers)	✓
Multiple security levels and permissions for the administration system	✓
All data changes are tracked in the system for audit/review purposes	✓

Milliman is among the world's largest providers of actuarial and related products and services. The firm has consulting practices in life insurance and financial services, property & casualty insurance, healthcare, and employee benefits. Founded in 1947, Milliman is an independent firm with offices in major cities around the globe.

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