



Flexible, Scalable Plan Administration Systems Designed to Support Both Complex & Simple Applications

The Andesa Plan Administration system leverages modern software technology and decades of business acumen to meet the sophisticated record-keeping requirements inherent to nonqualified deferred compensation plans.

Our scalable, web-based plan administration solution provides distributors, plan sponsors, plan participants and carriers with a unique level of asset/liability management and record-keeping support for all manner of plans, including:

- Variable and fixed defined contribution income plans
- Defined benefit income plans
- Split-dollar life insurance arrangements
- Death-benefit-only plans
- Corporate-owned life insurance
- Bank-owned life insurance

Why choose the Andesa Plan Administration system?

Users of the Andesa Plan Administration system enjoy a number of unique benefits, including:

- 24/7/365 access to plan administration tools, allowing them to revise personal demographics, set contribution allocations, change provisions, model what-if plan changes and generate accounting, plan and participant statements
- Fully-brandable sponsor portals, letting brokers and carriers present a seamless user interface to their clients
- Instant, web-based delivery of scheduled, recurring and ad-hoc reports
- 24/7 access to full plan histories, including plan values and documentation, as of any date

Integration Matters

Some plan administration solutions stand alone in a technology ecosystem, often resulting in duplicate efforts and mistake-prone redundant data entry. The Andesa Plan Administration system, by contrast, is integrated with other Andesa solutions, including Policy Administration, Illustrations,

the New Business Portal and the Self-Service Portal.

Turn to the back of this sheet to learn the five questions you should ask a plan administration vendor before considering their solution.

Why choose Andesa

How is my Plan Administration vendor compensated?

Andesa offers an alternative to the commission-based model. A broker's commissions are not shared with Andesa. Instead, Andesa's fee-based model ties to system usage and plan size. In addition, the broker controls the level of client service provided by Andesa and retains primary and ongoing contact with their clients. All reports and web portals are broker branded as well.

What services are provided to support my business?

Andesa offers a wide spectrum of services to best meet a broker's needs. The service offerings range from a System Service Option (SSO) to a Full Service Option (FSO). In the SSO option, the broker utilizes the Plan Administration software to perform ongoing support to their clients. In the FSO option, Andesa staff operates the software to perform the essential plan administration service functions including plan calculations and report generation.

Is my data secure?

Andesa maintains SSAE 16, SOC 1, Type II and SSAE 16 SOC 2, Type I (unqualified opinion).

In addition, Andesa maintains redundant datacenters and mature information protection program including data replication across two geographically separated locations as well as daily, off-site encrypted backups.

What types of plans do you support?

Andesa supports a modern, nonqualified focused technology platform with architecture to handle the complexity of a wide range of plan designs, including variable deferred compensation and split-dollar plans. The administration platform was designed specifically to support nonqualified plans with input from top firms in the industry. Enhancements are continuously being made to the platform to stay relevant with ever-changing plan design and support needs.

Where can I turn for support?

For more than 33 years, Andesa has specialized in providing the highest possible level of support to clients. From an experienced client engagement staff to a highly engaged technical team, brokers will be able to get in touch with someone who can help overcome service challenges or work directly with a client.

To learn more, visit our website at

andesaservices.com or call **610-821-8980**

About Andesa

Andesa Services provides comprehensive, integrated policy administration, plan administration and support solutions for life insurance and annuity carriers and producers. Andesa began as a pioneer in the field of COLI/BOLI policy administration. Today more than 30 years later, Andesa's integrated approach to insurance and plan administration results in efficiency gains, reduced hardware costs, mitigated compliance risk and improved market response. The Company offers a comprehensive suite of services for policy

and plan administration in a secure, private cloud environment. Andesa partners with numerous insurance companies, including 7 of the top 13 life and annuity carriers, along with several top producers. The Company's highly-experienced team of U.S.-based professionals provides insurers and producers large and small with administrative support for complex plan and product offerings.