

# GEM

Golden Egg  
Management System

*An easy to use online solution for your  
pension board management needs*



## Golden Egg Management

*Secure, Efficient, Easy.*

Brought to you by:



**BENEFITS-USA**



**3E Tech Corp**



**954.384.1688 - Ext: 436 (GEM)**



**Info@GoldenEggManagement.com**



**2800 Glades Circle, Suite 109  
Weston FL, 33327**



**www.GoldenEggManagement.com**

# Golden Egg Management



**Secure**  
**Efficient**  
**Easy**



"GEM Software has maximized our productivity by allowing staff to access employee data and forms from one source. Our employees can view member information either at their desk or review the data with the member at their jobsite, at a pension board meeting, or at open enrollment. Regardless of the operating system, the GEM software provides access to our staff and membership wherever they are, providing added value to our services."



- Pete Prior  
**President, Benefits-USA**  
A 3<sup>rd</sup> Party Administrator of  
Public Pension Plans

## System Highlights

- Actuarial Retirement Calculations
- Pension Plan Information
- Member/Beneficiary Profiles
- Customer Service Notes/Tasks
- Record Change Auditing Trail
- Social Security Death Check
- Paperless Document Management
- Plan Fund Performance History
- Member Transaction History
- Meeting Minutes/Agenda
- Shared Plan Implementation
- DROP Implementation

Golden Egg Management System (G. E. M.) is web-based system that allows all stake holders in a Defined Benefits Pension Plan such as its Board of Trustees, Administrators, Service Providers, and Participants to collaboratively conduct their activities **securely** and **efficiently** at one common location.

With easy to use customer service management, built in on-demand actuarial calculation and complete audit trail, it can make your Pension Plan management related operation more organized, easier to perform, better tracked, and save you time and money at the same time.



# Golden Egg Management



## Actuarial Retirement Calculations

The built-in module of Defined Benefits Plan Retirement Actuarial Calculation quickly and accurately calculates your monthly retirement payments under different retirement options instantly online. All calculations can be downloaded as a PDF file.

## Member/Beneficiary Profiles

This comprehensive module enables plan administrators to search and manage each plan participant's profile, including contact information; plan related information; beneficiary information; salary and contribution history.

## Customer Service Notes/Tasks

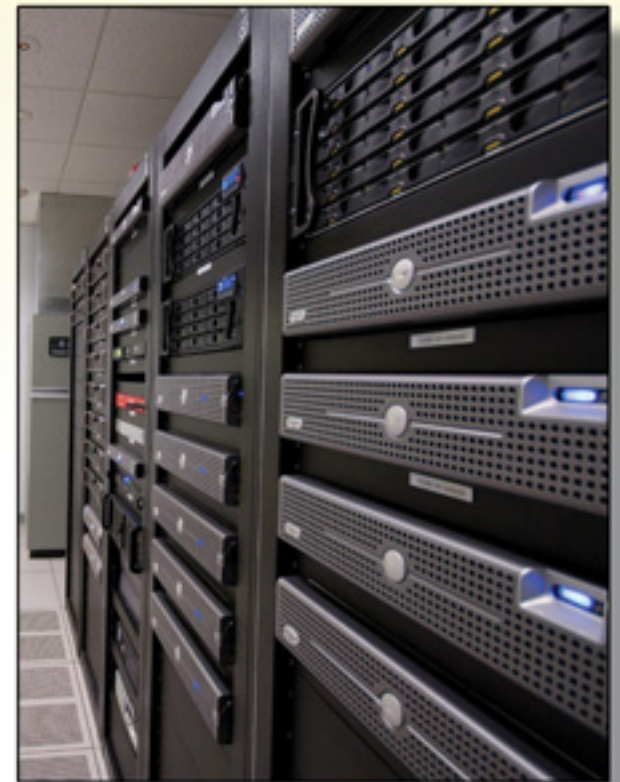
This easy to use Customer Relationship Management module allows the plan administrators to log service notes/actions at each individual member level, set follow up reminders for each task and maintain a history of all services performed.

## Paperless Document Management

Plan administrators are able to upload and publish important plan documents for plan participants to download and fill out. Member documents are stored with each member's online account for easy retrieval.

## Social Security Death Check

Linked directly with the Social Security Administration's monthly Death Master File, this module automatically checks all your members against the new data from SSA within 48 hours and notify the plan administrators of its findings. Saving you both time and money.



We have chosen Peak 10 as our hosting partner for the GEM System. You can rest assured that your data is safe with one of the best data centers in Florida.

Call today or Email us at:  
[info@GoldenEggManagement.com](mailto:info@GoldenEggManagement.com)  
to schedule a free demo and see how you too can benefit from the GEM system.

Contact us and we will happily show you how GEM can work for you.

