

REDUCE COSTS AND IMPROVE SERVICE DELIVERY

PENSION PLAN ADMINISTRATION

Our offerings

- Defined benefit plan administration
- Defined contribution plan administration
- Career average plan administration
- Cash balance plan administration

Administering an organization's pension plans is a complex and time-consuming activity with many demands. It requires a high degree of expertise to control costs and maintain quality, while engaging plan members in managing their benefits and improving their ability to make decisions about their retirement. Managing pensions becomes even more difficult, because it involves more than just a financial decision - it's an emotional investment for members. If outsourcing, an organization should entrust the administration of its pension plans to a specialist.

An outsourcing provider that delivers results

ExcellerateHRO's dedicated specialists understand how to successfully administer pension plans. We provide quality processes, sophisticated reporting tools and administration systems that can be easily adapted to our clients' specific requirements. Our service can help reduce administration costs and improve service delivery to plan members, engaging members more effectively and increasing their satisfaction. The result is a superior administration service and a superb member experience, all at a competitive price.

Our clients also benefit, as valuable resources are freed up to focus on other important issues. We work closely with each client to successfully run the client's pension plans (many of which have their own unique requirements) or if appropriate, to ensure the seamless transfer of existing pension plans to ExcellerateHRO.

Key services

- Processing on a cyclical, event and year-end basis
- Pensioner payroll services
- Full trustee report and accounting services
- Preparation of regulatory, management and trustee reports
- Client-focused contact center
- Centralized on-site production of member statements and plan correspondence in our client's preferred style and format
- User-friendly Web access for the company, trustee and members to view pension plan information and make changes
- Plus, administration services for share and flexible benefit plans

ExcellerateHRO

The HRO business of EDS, an HP company

Why choose ExcellerateHRO?

ExcellerateHRO is committed to the pensions market and will be there to support our clients for the long term, refining our services as client needs evolve. Our strengths in the following areas enable us to provide superior service at a competitive price:

FAST FACTS

- ExcellerateHRO has more than 20 years experience managing pension plans and is one of the most experienced pensions administrators in the UK.
- ExcellerateHRO is the HR outsourcing business of EDS, an HP company.
- We have more than 350 clients globally.
- We currently administer pension plans for more than 100 clients globally.

- **Partnership approach** - We work with clients in a consultative way to understand their business and specific requirements, to identify the best way forward, and then to work in partnership with them to successfully achieve their objectives. In essence, we want to be perceived as an extension of our client's organization.
- **Experienced people** - We aim to build long-term relationships with our clients, providing each with an experienced senior point of contact and a highly trained, dedicated team of administration specialists (many of whom are professionally qualified and have been with us for more than six years). Their expertise ensures the smooth operation of your pension plan administration.
- **Quality processes** - Our focus on quality is the driving force behind our services. Our quality-assurance processes are registered and accredited under ISO 9001:2000 and are supplemented by service standards that are agreed on with each client. This ensures a documented and consistent approach that is critical to us providing efficient and effective administration services.
- **Proven technology** - We offer sophisticated technology tools to support our pension plan administration services. Our proprietary software gives us ownership of the systems required to meet your pension plan needs. Our Web-enabled administration systems are supported by a secure access network through our Internet service provider.

"During the past three years, ExcellerateHRO has supported us through one of the most complex pension plan mergers in the UK market, helping us take 13 separate plans and merge them into one consolidated plan. Throughout this time, they have been open and honest with us, managed our expectations through effective communication, provided resolution of issues, and demonstrated their genuine commitment to partnership and high-quality customer service. As a result, we are now seeing the value of improved service levels, greater efficiencies in our processing, and positive reactions from our employees and retirees."

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