

Newkirk's

# STATEMENT eWAREHOUSE

Fact Sheet

## Description

Newkirk's Statement *eWarehouse* is the online service option within Newkirk's comprehensive statement solutions. When you become an *eWarehouse* customer, Newkirk will create electronic versions of your participants' statements, accessible by you through a password-protected Internet site. Providers can grant employer access to the *eWarehouse* to allow plan sponsor's human resources and payroll personnel to respond to employees' statement questions and requests. Electronic versions will be sent to participants who elect electronic delivery. Even participants opting only to receive printed versions can view the electronic version by logging into the *eWarehouse*.



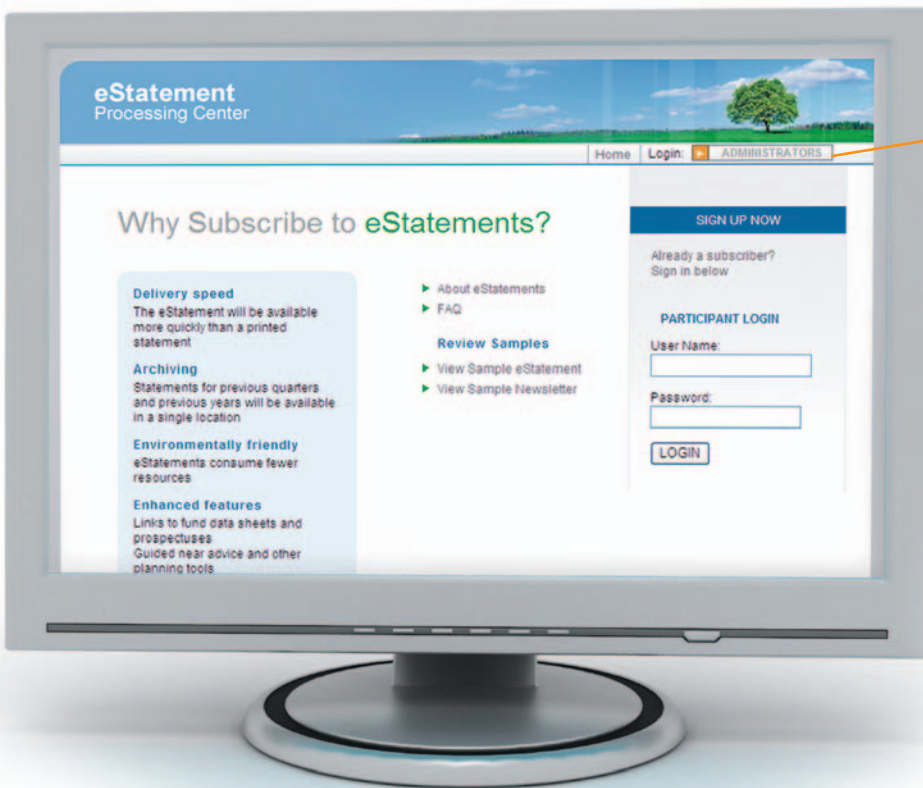
## Customer Service Minded

The electronic versions created by Newkirk can be made available to your customer service representatives (CSRs) so they can answer participant questions about their statements while viewing what the participant sees. If a participant hasn't received a statement or wants a replacement, it can be printed locally and mailed. By minimizing involvement in these activities, a provider saves additional time and money.

## Service Options

Newkirk's statement solutions can be packaged a number of ways! *Combine one or all:*

- Paper statements and *eWarehouse*
- *eWarehouse* only (*eStatements* only)
- Paper statements, *eWarehouse*, and notice
- *eWarehouse* and notice



The four user sites (Registration, Participant Viewing, Sponsor Administration, and Provider Administration) are accessible from a single web page.



Site users can easily search data by multiple criteria.

Data can be organized and sorted by category.

Users can navigate through multiple pages of data without leaving the current, active page.

## Features

- **Accessibility.** The four user sites (Registration, Participant Viewing, Sponsor Administration, and Provider Administration) are accessible from a single web page.
- **Secure login.** All logins are checked for password strength and expired accounts. All logins will lock out after 5 failed login attempts. Locked out accounts can only be unlocked by a provider administrator, followed by a password reset.
- **Archiving and participant viewing.** Access current and past statements. Participants may want to compare current statements to previous information.
- **Provider administration site.** Enables provider to view all participant information, manage sponsor/participant sites, review sponsor summary reports, respond to questions, etc.
- **Sponsor administration site.** If granted by the provider, employers have access to participant statements.
- **Sponsor's summary reports.** Provide employers with summary information about participants' activity — loans taken, money moved between or into funds, cumulative fund balances, etc.
- **Enhanced searching and reporting.** Online reports have searchable, sortable, pageable grid controls: Access Participant Information, Audit Reports, User Reports, Summary Reports, and Tracking.
- **Text management tools.** Gives providers the ability to easily edit and update text on the participant site, as well as the *eStatement* e-mail notice, and subscribe/unsubscribe information for participants.
- **Statement print approval.** Quickly identify the status of a particular job for easy approval.
- **Tracking.** Offers the ability to download Plan and Tracking Information Reports in .csv format.

## Learn More

To find out more about Newkirk's Statement *eWarehouse*, call **518-862-3226** or e-mail **info@newkirk.com**. Visit us online at **www.newkirk.com**.

