

# EBP BOT

## TIME IS MONEY. INCREASE YOUR MARGINS WITH AUTOMATION.

At BDO Digital, we blend an approach of business acumen, industry knowledge, and technical skills to help our clients overcome challenges with their benefit plan audits.

### EBP BOT OVERVIEW

Our Employee Benefit Plan Bot provides your staff with an automated process for data extraction of benefit plans and can save 10 to 20 hours per audit.

- ▶ Simple configuration
- ▶ All major plan connectors
- ▶ Data aggregated into Excel format

### PRICING: 12,000

Simple, **annual** subscription:

- ▶ Unlimited use (single user)
- ▶ All bot updates
- ▶ Maintenance including benefit plan URL changes
- ▶ Support and maintenance included
- ▶ Training for new resources

### RESULTS

#### Supported Plan Providers

- ▶ Fidelity
- ▶ Empower
- ▶ TIAA
- ▶ ADP
- ▶ Principal
- ▶ Transamerica

#### Extracted Data

- ▶ Excel format for easy search
- ▶ Assets & investments
- ▶ Participants/employee data
- ▶ Contributions
- ▶ Distributions & loans

#### Additional Features

- ▶ Secure credential management
- ▶ A la cart report selection menu for each plan provider
- ▶ Real-time progress indicator