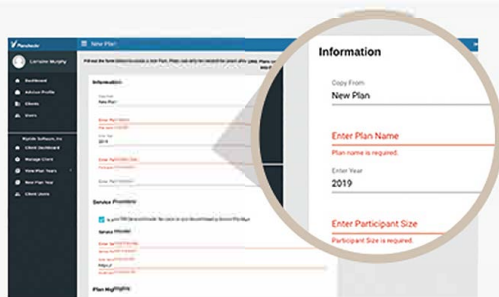
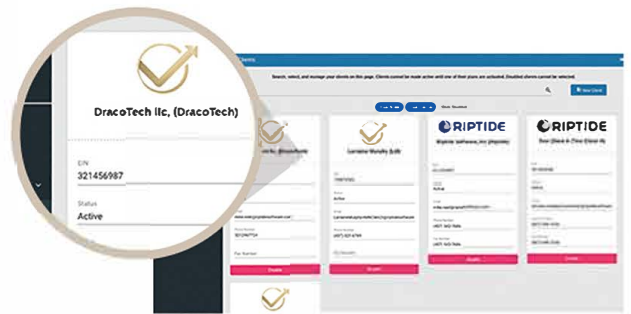


# Organized, effective, and secure on 5 EASY STEPS

## Create a Client

When utilizing Plancheckr you can manage multiple clients and keep them organized and secure. All in one place.

1



2

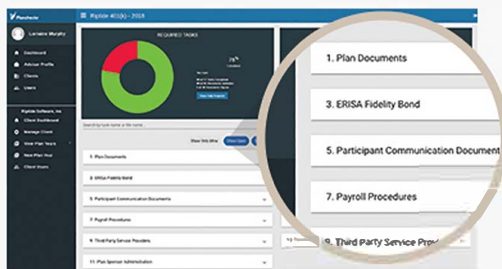
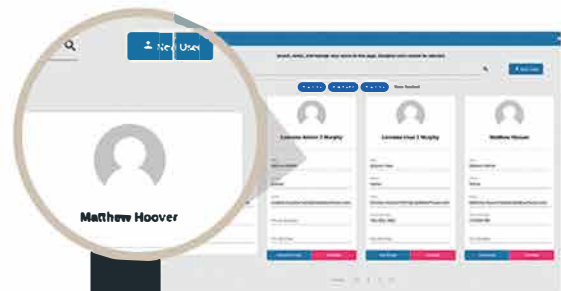
## Create a Plan

Plancheckr's built-in notification system keeps you and your plan sponsors informed and organized. Custom reminders are also available to help you keep track of organization-specific tasks.

## Create Users

Easily add staff-level users to help manage your company files. Utilize the built-in WayPoints tutorial software for seamless adoption into any organization.

3



4

## Upload & Sign Documents

You will upload and sign the required documents as they become available throughout the year. Custom reminders are also available to help you keep track of organization-specific tasks.

## Review DOL Audit Reports

At any time, with a click of a button you can have your report available for an audit. It will only take a couple of minutes.

5

