**5-28 Process Minutes**

1. **Implementation**

* Jill reviewed some of the more notable comments from her phone calls
* Interesting to note the variation in the number of plans per employee across the firms
* Also the segmentation across firms- platform, start-up versus takeover
* Each firm seems to have a different name for the role
* Each firm has their own NB firm
* In some firms, the owner/sales person handles the implementation
* MAP is ahead of the curve with respect to automation
* AimPoint has hired someone to work with new business data files
* Many of gthe firms use Pension Pro and want to know how everyone isle is using it
* Acuff- the implementation team handles the first year’s admin
* All members are interested to hear about any ways to increase turnaround time
* The number of implementations per person varies dramatically across firms- from 15-20 to 300+
* TSC sent Jill their sample checklist
* Jill will share her spreadsheet with the group for review

1. **Distributions**

* Bryan reviewed some of the more notable comments from his phone calls
* One of the biggest pain points is 1099s- many firms push it off to Penchecks
* Big Challenge is that the RKs have varying processes for force-outs
* Bryan will share his spreadsheet with the group for review

General Note- we’ll need to keep the conversation at the Annual meeting at an appropriate level for all attendees- some may not be heavily involved in the processes. We’ll provide a detailed overview of what we’ll be discussing prior to the meeting so the attendees can be prepared.

1. **Next Call June 19th at 2pm ET**