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TRUSTEE DOCUMENT WAREHOUSE

The Document Warehouse is a secure central repository of all essential trust Fund documents.



PRODUCT OVERVIEW

The Document Warehouse is a secure central repository of all essential trust/plan documents accessible over the Internet. The warehouse can be updated and accessed by Plan staff, designated professionals, and Trustees. Access to specified areas of the Warehouse may be limited or restricted based on the user's status and access rights. **AgendaNow™** is a feature of the warehouse enabling trustees and plan professionals to download the entire Board meeting agenda package to their tablets or notebook computers with a single mouse-click.

PRODUCT FEATURES

- Documents can be stored in any standard file format: PDF, Word, Spreadsheet, or HTML, and are easily categorized for quick access.
- Documents can be uploaded by any designated person.
- Documents secured at the plan or document type level.
- Easy-to-use Browser access
- Within each Board meeting agenda document posted, reports and other uploaded files may be internally linked to the relevant agenda items for one-click viewing or downloading (offsite or at the meeting).
- Documents can be marked as current, draft, or archival so that the warehouse can be used to maintain copies of all historical reports and documents. The warehouse can also be used as a working area for Plan professionals and trustees to distribute, review, and update communications which are in development.
- Search features across entire warehouse

TYPES OF DOCUMENTS

- Board Meeting Agendas
- Minutes of Board and Committee Meetings
- Collection Reports/Delinquency Reports
- Summary Plan Descriptions, Plan Documents
- SMMs, Plan Amendments
- Bargaining Agreements
- Reciprocity Agreements
- Vendor Contracts
- Trust Agreements/Declarations of Trust
- Investment Policy/Reports
- Actuarial/Consulting Reports
- 5500s, Audit Reports, Financial Statements
- Summary Annual Report
- Trustees and Plan Professionals Contact List
- Newsletters, Announcements, and Other Communications



**STOP AGENDA
PACKAGE BLOAT**