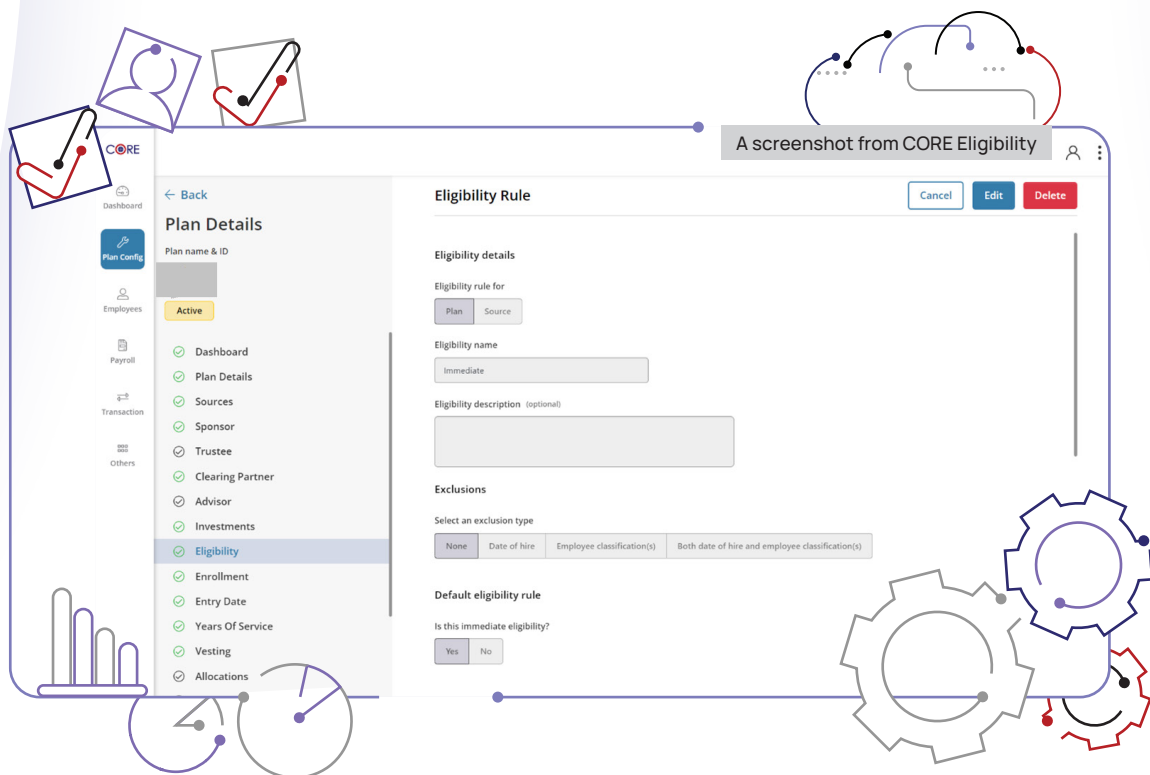CONGRUENT®

READY FOR TOMORROW

C⊙RE Eligibility
Eligibility automated

CORE Eligibility helps simplify your eligibility
processing and offers capabilities like
auto-enrollment, participant communication,
break-in-service computations, and auto escalations.

A screenshot from CORE Eligibility

CORE Eligibility module enables

Automation

- Eligibility determination based on age, length of service, hire dates and hours, etc. at both plan and source levels
- Periodic or on-demand eligibility checks
- Enrollment/re-enrollment
- Support for LTPT eligibility calculations
- Personalized communication
- Contribution escalation
- Break-in-service calculations

Reporting

- Reports on eligible and ineligible employees along with the reason for ineligibility
- Sponsors and administrator dashboards to view the breakdown of all employees who have opted out
- Forecasting eligibility and entry dates

Flexibility

- Configurable rules engine with the ability to define any number of eligibility rules
- Different rules for employees in different locations, divisions or other classifications
- Multi-tier eligibility and grandfathered provisions
- Effortless integration with existing record-keeping systems for census data, plan rules, payroll details etc.

Product features

- Delivered as a licensed application or a hosted solution, CORE Eligibility can serve the needs of plan sponsors, plan providers, record-keepers, and advisors of all types and sizes.

ABOUT CONGRUENT

Congruent Solutions is a trusted specialist in technology-driven services for the retirement industry since 2004. Today, our CORE SaaS and outsourced plan administration services empower leading Fortune 500 plan providers and third-party administrators to solve business challenges and be ready for tomorrow.

CERTIFIED **ISO** 9001:2015 **COMPANY**

CERTIFIED **ISO** 27001:2013 **COMPANY**

AICPA SOC aicpa.org/soc4so

ABOUT CORE SUITE

Scan to know more about CORE Platform and its modules

Congruent's CORE suite is a cloud-based modular SaaS for managing and administering retirement plans in the US. Trusted by leading plan providers, CORE provides outsized savings, risk-free digital transformation, better user experience to sponsors and participants, and reduced plan churn.

www.congruentsolutions.com | **info@cspl.com**