

# eFreedom<sup>®</sup> State Compliance Manager<sup>™</sup>

eFreedom Annual Statement software delivers the smoothest statement preparation available. The credit goes to an active User Group community and a design team dedicated to the mission of eliminating keystrokes and accelerating processes in every feature of the system. And now there is a new optional module to manage state forms that are compliant with regulatory and statutory reporting standards.

## Where's the Value?

The eFreedom State Compliance Manager is about giving you convenience and saving you time. The module provides:

- Details about required filings—you get due dates, number of copies required, notes and instructions from each state checklist
- A full calendar of all state and NAIC due dates—essential information in one calendar
- Monitoring by StoneRiver of all known online state-provided forms and instructions
  - We monitor so you don't have to, and then we notify you of any changes
- Ability to keep all your state filing materials in one place
  - Avoid the "it's out in a folder somewhere!" syndrome
  - Ability to attach external files (for example, scanned final copies with signatures, submission confirmations, internal documentation, etc.)
- Population of company and statement data from Annual and Quarterly statements
  - Save time—you don't have to type the same information repeatedly
- Enter data directly on state-provided PDF and spreadsheet forms
- Links to:
  - State locations for online submission (where available)—now you can go directly to the site, complete the information, and send it
  - Submission instructions
  - Form instructions (source from state)
- Ability to add internal due dates to the individual forms listing

If you are tired of tracking down details and forms, want new efficiency in managing statement filing, and want to offload the burden of monitoring state-provided forms and instructions for changes, then check out the State Compliance Manager module.