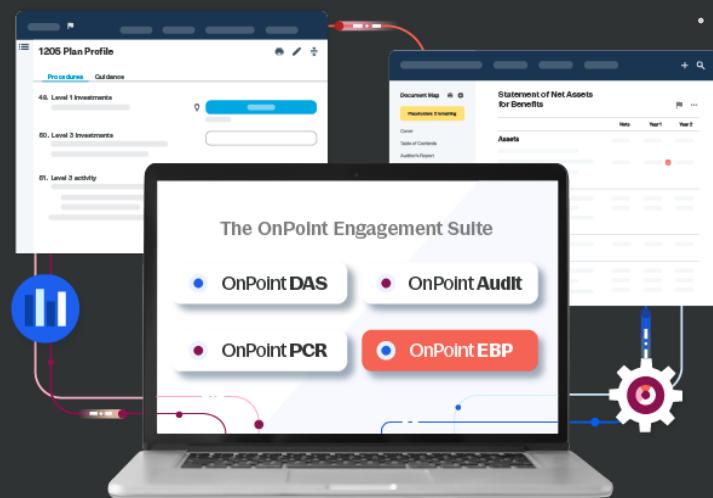


# OnPoint EBP

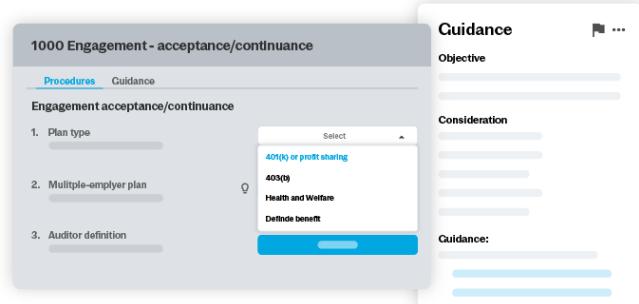
Delivers Efficient, High-Quality Employee Benefit Plan Audits



EBP audits face tight deadlines and fee pressure. OnPoint EBP standardizes and automates repetitive audit tasks reducing over-auditing, manual setup and reviewer back-and-forth.

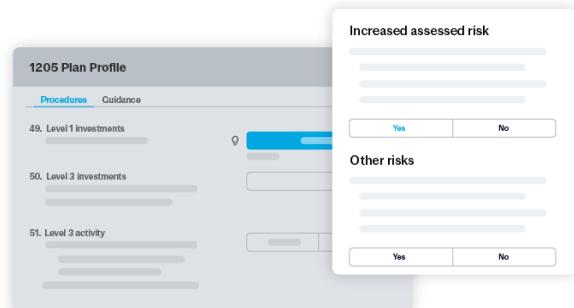
## Embedded AICPA-guided methodology

Standardized audit workflow aligned with professional standards. Integrated methodology ensures every engagement starts with the right structure. No more outdated templates.



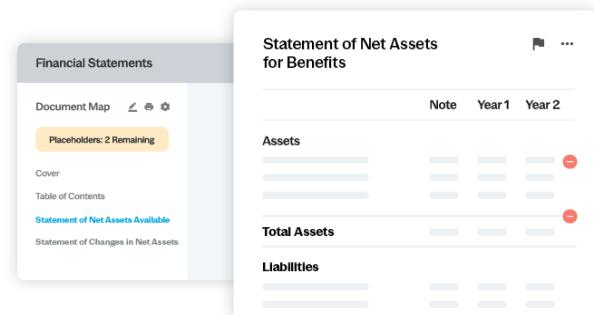
## Plan-Specific Setup & Fieldwork

Engagement files dynamically adjust based on plan type and key characteristics, revealing only the relevant risks, disclosures and procedures. Audit programs and testing steps are scoped automatically, helping your team focus on what matters.



## Automated Financial Statements & Disclosures

Draft financial statements and note disclosures generate automatically from your plan profile and trial balance. Deliver high-quality reports faster without manual formatting or last-minute changes.



# Start using OnPoint EBP today

## Set up Your Engagement

Select your plan type and upload your trial balance. OnPoint EBP builds a dynamically tailored engagement file and maps your data to power automation across the audit.

## Start Planning

Enter key plan details once. Risk assessment, audit programs and financial statements are automatically generated based on your inputs.

## Assess Risks

Each audit area includes pre-populated risks based on plan profile responses, editable by the auditor to reflect insights from key ratios.

## Begin Fieldwork

Audit procedures are automatically scoped based on assertions and plan characteristics. Testing templates help your team focus where needed.

## Complete Your Report

Generate draft financials and note disclosures as you go. Auditor's reports are pre-filled from your file, saving hours at the final stage.



AiDA, your built-in intelligent assistant, helps auditors get real-time guidance and contextual help right within the file.

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→ Summarize



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