



Episys® IRA InterfaceSM

Integration Between Episys® and
Ascensus IRAdirect Express



What if you could empower credit union users to send information directly from Episys to IRAdirect Express upon launching a PowerOn®?

BUSINESS VALUE

- Improve Operations
- Enhance Service

COMPATIBILITY

- Episys®

Today, credit union users need to manually enter information into both Episys and IRAdirect Express. But what if you could empower credit union users to send information directly from Episys to IRAdirect Express upon launching a PowerOn®, eliminating the need for duplicate entry?

IT WORKS LIKE THIS ...

With the Episys IRA InterfaceSM from Symitar®, you gain a seamless connection to the Ascensus IRAdirect express™ service. Using a PowerOn specfile and SSO, the interface submits the data for an application, withdrawal, or deposit directly from Episys Quest™ to Ascensus. This means you can eliminate double entry, improve convenience, and deliver a superior user experience.

WHAT IT DOES:

- Facilitates and simplifies transactions between Episys and IRAdirect express™
- Uses SAML SSO
- Supports Traditional, Roth, ESA and HSA accounts

WHAT IT DOES FOR YOU:

- Eliminates or reduces duplicate keying of data
- Streamlines the user experience for IRA enrollment and IRA transactions
- Provides truly integrated financial transactions
- Enables the completion of applications, contributions, and withdrawals through one convenient user interface