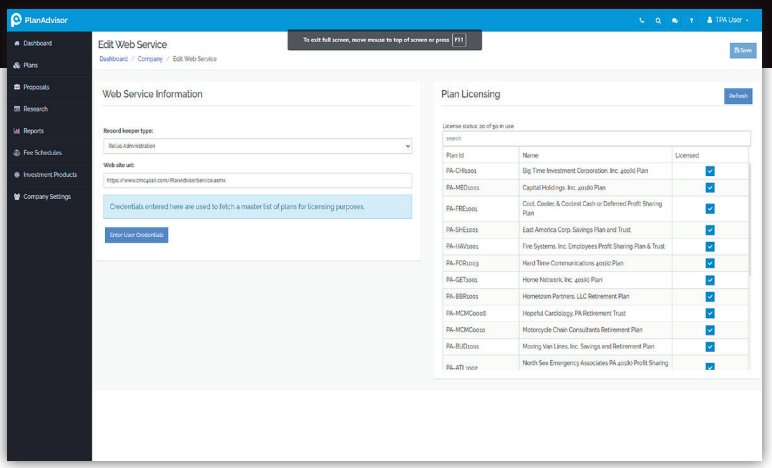
PlanAdvisor

PlanAdvisor New & Expanded Features

PlanAdvisor empowers retirement plan advisors to save time and money with fully streamlined and integrated workflows. By helping you fulfill your fiduciary duties and those of your clients more efficiently, you can forge stronger relationships and grow your business.

Below are some of our latest functionality breakthroughs and platform improvements. Please let us know if we can help your organization become a streamlined fiduciary.

Direct Connections



PlanAdvisor's development team boasts over 50 years of experience working with various recordkeeping platforms and custodians. This experience led to the development direct connections, which enables you to add and manage your various recordkeeper and custodian relationships. Through PlanAdvisor, you can automatically sync all your plans using Relius, Schwab Retirement Solutions (SRT) or OMNI recordkeeping systems or Mid-Atlantic as custodian. Connect in minutes by entering credentials for each website. PlanAdvisor will automatically update plan information with this connection, just set it and forget it.

PlanAdvisor is still the solution for advisors with plans outside of the recordkeeping systems and custodians that are currently supported. Custom plans allow you to create your plans and import all the investment data via file import. This allows you to stay up to date on all your plans all in one place.

If you work with recordkeepers or custodians that are not currently supported, we'd be happy to add them if they will allow us.

We not only strive to support the most flexible and widespread plan access, but we realize that plans across recordkeeping systems still go through the same review process. PlanAdvisor allows plan groups to be created from all your plans across all your recordkeepers. Once plans have been grouped, you can run reviews for all of them with just 3 clicks.

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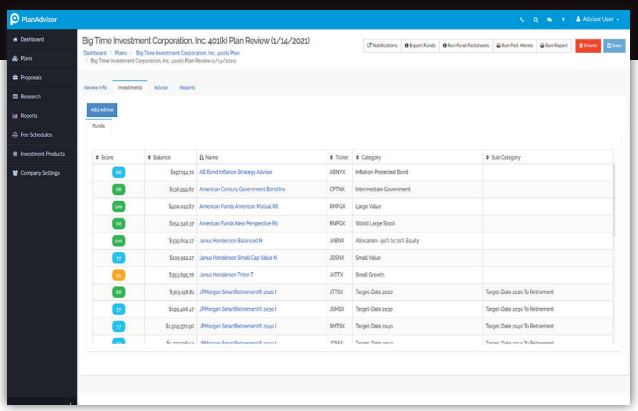
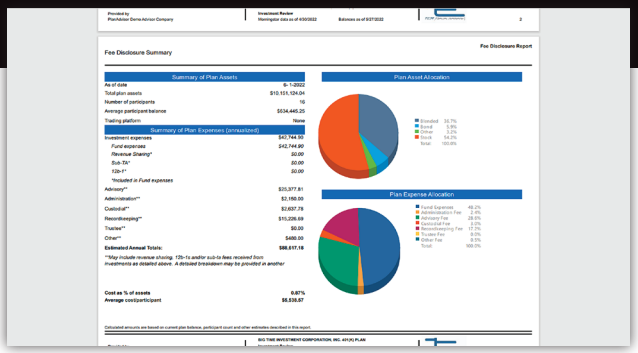
Reviews



PlanAdvisor is focused on providing approachable quick solutions for the day-to-day tasks of advisors. We provide you the luxury of reviewing all your plans with a click of a button. Create all your recommendations for the entire group, then handle plan sponsor feedback individually.

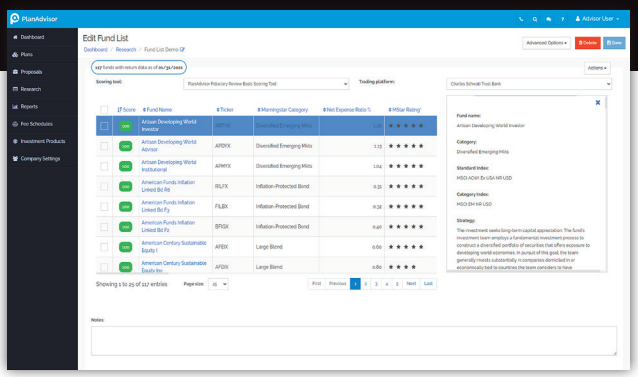
Reporting



PlanAdvisor provides fresh, templated, and engaging fiduciary reports. Customize the templates within PlanAdvisor by changing your logos and color schemes or add one or more .pdf files. Our platform also lets you upload, and manage your own company crystal reports. PlanAdvisor will keep your files safe in its Microsoft Azure Data Storage.

Want your own custom reports, but don't have crystal report experience? Our team of developers are now able to offer their services for creating bespoke crystal reports.

Fund Research



PlanAdvisor puts knowledge in your hands by always providing expansive and up-to-date Morningstar data on thousands of funds. Create fund lists using PlanAdvisor's exhaustive list of data points to filter funds. Do you already have fund lists that you want in PlanAdvisor? Use our file import system to bring in fund lists, custom funds, and even trading platforms.

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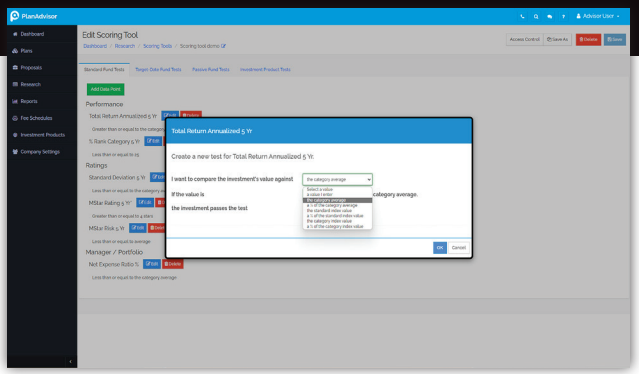
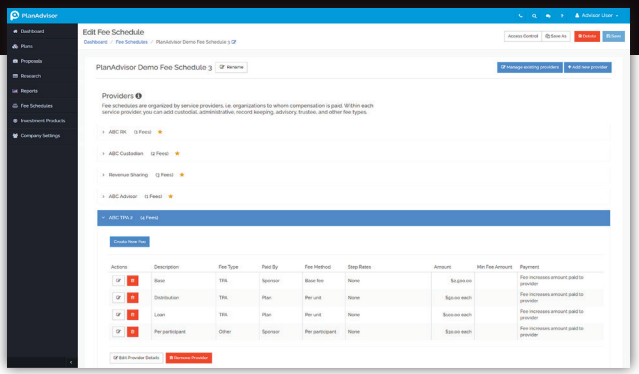
Scoring Tools

Fund Research is useful but being able to validate funds within a list or plan menu is awesome. Score target-date funds, passive-funds, and even investment products with PlanAdvisor's candid, cogent, and customizable scoring tools to ensure the health of your plans. Basic scoring tools will notify you if funds don't pass your criteria. Advanced scoring tools let you define a point-based weighted scoring system for funds based on your criteria.



Fee Schedules

Fees are an irritable inescapable reality, but that doesn't mean managing them has to be too. PlanAdvisor lets you create fee schedules for plans that automatically calculate amounts in dollars and basis points for fee disclosure reporting. You can report on all provider and investment costs in one place.



Looking for a streamlined solution to fulfill your fiduciary obligations as a retirement plan advisor? Take your business to the next level, and start saving time, money & resources.

Scan the QR Code and Request a Private Demo

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