

FOR IMMEDIATE RELEASE:

dailyVest Launches PlanAnalytics OneClick Dashboard

New Fiduciary Tool Helps Manage Financial Wellness of Employer-sponsored Plans

TUCSON, AZ., July 6, 2017— dailyVest, a leading provider of investment reporting solutions, announced the launch of PlanAnalytics OneClick Dashboard, a comprehensive plan sponsor reporting and analysis tool designed to provide a complete picture of DC plan health. Created specifically for plan sponsors, advisors, fiduciaries, TPA’s and administrators, PlanAnalytics reduces the complexities associated with compiling and analyzing raw plan data needed to assess plan health. The OneClick Dashboard displays key plan metrics such as participation, investment diversification, and contribution rates, to show where DC plans are succeeding and where they need help.

Plan sponsors and advisers are increasingly demanding that financial institutions provide better tools and services to more effectively manage plan health, help improve employees’ financial wellness, and reduce fiduciary risk. Anticipating these needs, DailyVest has developed a platform to provide actionable, data-driven insights for informed decision-making. With easy-to-understand metrics, PlanAnalytics OneClick Dashboard helps administrators take a more informed and proactive approach to managing their plan’s health, while bringing together the flexibility of anytime, anywhere plan management through online access via computer, tablet, and smartphone.

“The addition of OneClick Dashboard to PlanAnalytics represents a significant advance in plan sponsor reporting through engineering and product evolution,” says Pete McNellis, dailyVest’s Senior Vice President. “Our goal was to quickly and efficiently process and analyze vast amounts of plan data in order to produce distilled key metrics highlighting the most important trends affecting the plan.”



About dailyVest

Founded in 2001, dailyVest is a fintech company focused on helping financial service providers leverage their investor's account data through the use of powerful tools for investment performance and plan sponsor reporting. Today, more than 20,000 plans use dailyVest to monitor plan health, and over 7 million participants and investors have access to its content. For more information, visit dailyVest at dailyvest.com or contact us at 520-577-5729, ext 1.