

PlanAnalytics

Manage Financial Wellness of Employer-Sponsored Plans



PlanAnalytics is a comprehensive monitoring and analysis tool for DC plan sponsors, advisers, TPA's, and plan administrators. It analyzes the wellness of employer sponsored retirement plans, models investment behavior of all participants, and measures how well their plans are working.

Tools to augment and accelerate plan decision making have become the new imperative.

Key Benefits

Data-driven. PlanAnalytics is connected to the recordkeeping system and powered by participant data. Powerful reporting capabilities help business users draw intelligent conclusions for managing a sound savings and investment education strategy.

PRODUCT HIGHLIGHTS

- ▣ Customizable; integrates within plan sponsor portal
- ▣ Private-label to reflect firm's branding & style
- ▣ Responsive UI for tablet, smartphone, and desktop
- ▣ Batch process gathers participant census and investment data
- ▣ Big data analytics run securely in Cloud

Promote Plan Wellness. Spend less time looking for problems and more time on corrective action.

Manage Fiduciary Risk. Sponsors and advisers must understand fees and amounts paid to recordkeepers to avoid claims under ERISA. Plan Analytics extracts & organizes fee data for review.

Act in Participant's Best Interest. PlanAnalytics helps advisers perform fiduciary duties with tools and data analysis needed to act as an experienced and knowledgeable expert might -- with care, skill, prudence and diligence.

No More PowerPoints! Advise clients with Plan Analytics using relevant, actionable reports to build relationships, revenue, and healthy plans.

Anytime, Anywhere Plan Management. Sponsors, advisers, and administrators today want anytime/anywhere financial management for their plans. PlanAnalytics OneClick delivers this with robust functionality across multiple devices.



dailyVest delivers software that **recordkeepers, financial institutions, TPA's, and financial service providers** need to adapt and succeed in a time of rapid DC industry change. We combine three elements – **recordkeeping system data connections, analytics, and digital experience** into a **big data technology platform** that enhances a provider's ability to engage and empower their business users, plan participants, and investors.

More than **20,000 plans use PlanAnalytics** to monitor plan health, and over **7 million participants and investors** have access to dailyVest-generated content. Please visit dailyvest.com or call 520-577-5729, ext 1 for details.