



PlanAdminIQ is a powerful new tool designed to provide deep insights into the pension plan Recordkeeping/Administration Industry. This tool is built on the confirmed identity of the Recordkeeper (bundled plans) or TPA (unbundled plans). PlanAdminIQ is comprised of two modules that each provide unique perspectives into firms that provide recordkeeping (RK) and administrative (TPA) services to plan sponsors.

PlanAdminIQ Firm Dashboard provides a deep dive into an individual RK/TPA firm. This dashboard provides over 200 KPIs on seven views. Some of the top-level KPIs include total assets under administration and total plans administered. The dashboard also evaluates key metrics such as participant demographics, compliance rates, risk management, and overall performance.

Firm Criteria Search allows users to search for RK/TPAs based on all of the searchable elements in the dashboard. For example, a user could search for all RK/TPAs with at least \$100 million in assets under administration and Average Assets Per Plan of at least \$100,000 per participant. Or a user could search for all RK/TPAs with at least \$100 million in assets under administration and Average Assets Per Plan that rank in the 80th percentile or greater. A plan auditor could also search for RK/TPAs with the highest number of plans that require audits.

Overall, PlanAdminIQ provides C-suite executives with the data-driven intelligence needed to optimize their service offerings, ensure regulatory compliance, and make informed strategic decisions. With its user-friendly interface and robust reporting capabilities, PlanAdminIQ is the essential solution for companies looking to enhance plan administration and stay ahead in a competitive market.