ERISApedia

Advantages for your business

- Quickly and accurately identify new client opportunities
- Use AI to increase efficiency.
- Gain useful intelligence into potential new client relationships
- · Prepare for initial meeting with valuable insights
- CRM integration available

Plan Name	Num	Туре	5500 Type	Sub Type	Other Plans	City	State	Providers	Assets	Part	Admin Signed Name	Ptan + Email 1	BM Score	Ase Acct Bal
V		0 7	[v	0 7		V	7		7	- v	V		. 7	V
Randard Process Inc. 401k And Profit Shari	001	DC	\$500	Profit S	OCProft SharL	Paimyra	wi	Show (32)	109,408,286	611	Tim Goe	tpoeben	90	178,480
npro Corp. 401(k) Profit Sharing Plan	001	DC .	5500	Profit S	OCProfit SharL	Muskego	w	Shoe (23)	67,458,031	717	Stephen	sciegier	32	94,641
Cannella Response Television 401(k) Plan	001	DC	\$\$00	Profit S	None	Burington	w	Shoss (45)	10,821,418	110	Karl Thele	ichele@	42	93,265
Ine Corporation 401(k) Profit Sharing Plan	001	DC	5500	Profit 5	None	Janepville	W	Show (1)	10,817,935	83	Kimberly	kimberly	80	124,344
Widity Science Retirement Savings Plan	001	DC	5500	Profit S	OCProfit Shark	Waterford	WI .	Show (4)	43,418,586	32	Katy Smith	iatyanit	51	135,260
Senerac Power Systems, Inc. Employees 40	003	DC	5500	Profit 5	;0CProfit Shari	Waukesha	WI .	Shore (27)	253,063,352	7,093	Joe Kevel	joe.kaval	54	35,685
Southern Wisconsin Emergency Associates	001	DC	5500	Profit 5	None	Jatestile	WI.	Shoiii (1)	22,738,277	3	John Ma	jnaher@	99	668.772
Primex, Inc. And Affiliates Profit Sharing An	001	DC .	5500	Profit 5	.DCProfit Sharl	Lake Geneva	WI.	Show (6)	24,259,036	233	Jillan Bre-	jorenner	65	104,564
		08			08/haditional		V01		24,244,179	6-		dnile@		

Powerful Search Capability and Filters

- Immediate downloads to Excel
- Historical information available
- Includes critical data for all plans including DC, DB, 403(b), Health and Welfare, etc.
- Modern Web Architecture
- Search and operating speed optimization
- Easy to use/understand interface
- Flexible platform for enhancements
- Extensive and flexible plan characteristic filtering

Plan Data Intelligence ReSource

- Valuable and innovative qualified plan data mining tool
- Create highly customized emails using Generative AI based on the benchmarking KPIs you select
- Search by TPA/Recordkeeper for most of the large recordkeepers and many TPAs
- Prepare concise summaries of plan features and documents using custom data.
- Updated constantly as the DOL releases filings
- Identify plan opportunities with the most powerful filters and features available
- Gather insight from filings as well as examine details inside plans
- Affordable pricing

Includes Plan Operational Benchmarking

- Quickly compare a given plan to a peer group using standard or custom criteria
- Easy-to-read, colorful and customizable benchmark reports of operational excellence and deficiencies.
- Planning tips provided based on the individual benchmark results and plan characteristics.



Brought to you by the ERISA compliancefocused professionals at ERISApedia.

Put some powerful intelligence behind your business development efforts.

It's all here, and easy to use. **\$ERISApedia**

email sales@ERISApedia.com or call 612.605.2266

ERISApedia a Burrmont Compliance Labs Company