



- Valuable and innovative qualified plan data mining tool
- Create highly customized emails using Generative AI based on the benchmarking KPIs you select
- 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

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	Plan Type	Plan Size	Plan Type	Other Plans	City	State	Provider	Assets	Part	Admin	Plan	BM	Act	Other Products
Standard Process Inc. 401k Profit Sharing Plan	001	DC	5500	Profit S.	DC/Profit Share	Norfolk	VA	108,458,280	612	Tom Gaa	Spencer	99	176,400	
Ingeni Corp. 401(k) Profit Sharing Plan	001	DC	5500	Profit S.	DC/Profit Share	Muskegon	MI	67,888,291	717	Stephen	Adger	42	94,641	
Genetec Resource Television 401(k) Plan	001	DC	5500	Profit S.	None	Burlington	VA	10,821,419	116	Ken Threl	Wheeler	42	93,288	
Line Corporation 401(k) Profit Sharing Plan	001	DC	5500	Profit S.	None	Jacksonville	FL	10,817,935	87	Kimberly	Kimberly	55	104,244	
Avco System Services Inc. Savings Plan	001	DC	5500	Profit S.	DC/Profit Share	Westfield	MA	42,614,520	321	Ken Smith	McGinnis	55	100,260	
Genetec Power Systems Inc. Employees 401(k)	003	DC	5500	Profit S.	DC/Profit Share	Waukegan	IL	255,981,932	5,080	Joe Kowalski	Jankovic	54	58,685	
Southern Wisconsin Emergency Associates	001	DC	5500	Profit S.	None	Jacksonville	FL	22,738,277	34	Joyce M.	Joyner	55	695,772	
Armes, Inc. 401(k) Profit Sharing Plan	001	DC	5500	Profit S.	DC/Profit Share	Laurel Grove	VA	24,279,570	232	Julian B.	Joyner	55	104,244	
Insurance Policy, Inc. Pension Plan	001	DB	5500	Profit S.	DB/Profit Share	Waukegan	IL	24,244,179	64	Charles R.	Joyner	54	678,818	
Freedom Group System Retirement Plan	001	DC	5500	Profit S.	None	Madison	WI	20,471,879	712	Barry D.	McGinnis	42	42,918	
Waukegan Gas Employees 401(k) Plan	003	DC	5500	Profit S.	DB/Profit Share	Waukegan	IL	20,471,879	414	Barry D.	McGinnis	42	73,559	

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

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.



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