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Win Clients.

Plan Data Benchmark ReSource

This new ReSource allows the user to quickly compare a given plan to a peer group from either a standard grouping or one that you create from custom criteria. Once created, the user is then provided with useful planning tips based on the individual benchmark results and plan characteristics.

The database is updated monthly and includes 176 unique standard peer groups and almost limitless user created custom peer groups.

Advantages for your client service and business development efforts include:

- * Show your expertise in new and existing client meetings with valuable operational insight about the plan
- * The report contains up to 25 suggestions for specific improvements to the plan based on current plan design and operation
- * Provide an ongoing scorecard to current clients as a unique "value-add"

Other Features and Benefits

- * Comparisons to eight highly relevant metrics
- * Comparisons reported in large colorful gauge graphs providing quick insight into a plan's operational performance
- * The report is delivered as a Microsoft Word file so the report may be further customized after it is generated
- * Once generated, the report is delivered automatically to the user via email attachment

Premium Subscription Available:

- * Allows for batch processing of reports as well as report customization
- * Upload spreadsheet of plan EINs and the system will generate reports for all plans on the spreadsheet
- * Provide your logo and preferred color scheme and we'll customize your report
- * Export your benchmark reports to your sponsor portal (requires portal vendor capability)
- * Premium is provided with two or more user licenses

Brought to you by the ERISA compliance focused professionals at ERISApedia.com

Put some powerful intelligence behind your business development efforts.

Act now – [call us 612.605.2266](tel:612.605.2266) or [email sales@erisapedia.com](mailto:sales@erisapedia.com)