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Win Clients.

The Plan Data Intelligence ReSource

The **Plan Data Intelligence ReSource** offers a powerful and very valuable data mining tool. While offering the ability to search Form 5500 data, similarly as do other products, we also offer the ability to search for any provider and even search the ATTACHMENTS and SCHEDULE of ASSETS! That means you can search for a particular asset or asset type.

Our **ReSource** gives you the ability to gather insight and information from the 5500 filing as well as look into the details inside the plan!

Advantages for your business development efforts

- Quickly and accurately identify new client relationship opportunities
- Gain valuable intelligence into potential clients
- Better prepare for your initial meeting with valuable insight about the plan and about the appropriate and specific improvements you can offer

The ReSource allows you to search by sponsor name or portion thereof, EIN or multiple EINs, geographic location such as in or near a specific zip or zips or in specific state or states

You can specify sponsor type(s) as well as plan type(s) and then fine tune your search with filters such as: specific service provider(s), size of plan, asset classes, plan features (or lack thereof) as well as warnings noted on the 5500 filing

Save your search and run it every month, or quarter or modify as often as you see fit

Our system is web based and the data is updated constantly as the DOL releases filings

Our revolutionary platform empowers you with a state-of-art and user friendly interface giving you access and insight into the database rich with opportunities.

INCLUDES Plan Operational Benchmarking!

You can 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.

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 or email sales@erisapedia.com**