ERISApedia.com Plan Data Intelligence ReSource



Advantages for your business

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



Powerful Search Capability and Filters

- Modern Web Architecture
- · Search and operating speed optimization
- Easy to use/understand interface
- Flexible platform for enhancements
- Extensive and flexible plan characteristic filtering

- Valuable and innovative qualified plan data mining tool
- 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.



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