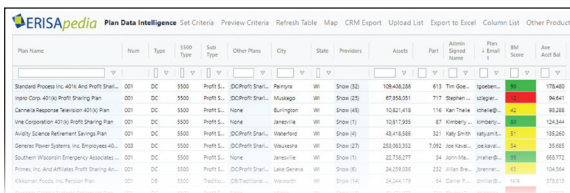# ERISA*pedia*

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

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
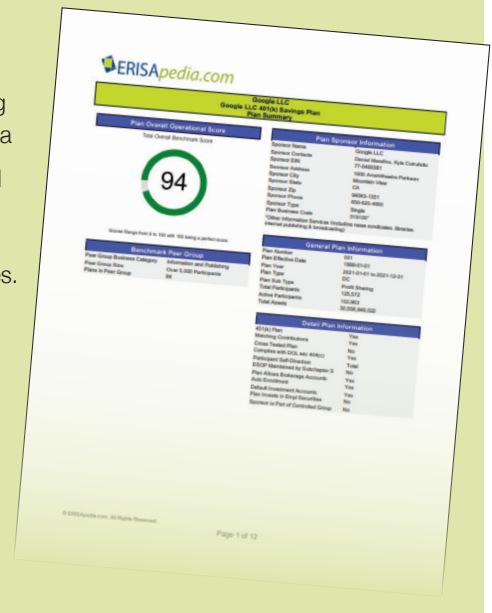- CRM integration available

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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