IRA Clarity™

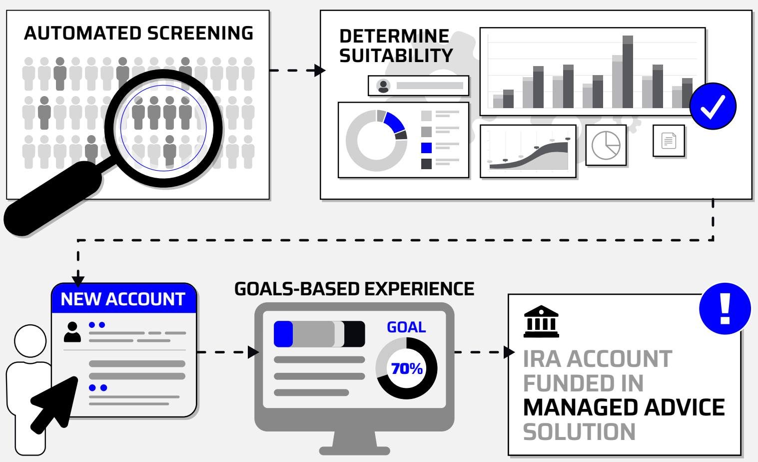
ijoin Broadridge nextlevel IRA

Automated IRA candidate screening, suitability, communications, and account opening to help plan advisors retain rollover assets.

Employees retire and roll over their 401k balances to other providers. You lose AUM, and they lose the benefit of a highly-personalized, goals-based experience that already understands their progress and needs. They also lose access to their managed advice program.

iJoin's IRA Clarity is built to address this challenge and help you retain customers and assets by creating clarity about:

- People in your retirement book who may benefit
- Determining IRA suitability
- Communication and IRA account opening
- Keeping clients and providing advice



iJoin handles **automated screening**, hands off to Broadridge's Decision Optimizer to determine **suitability**, and has built-in, targeted **emails to invite** rollover-eligible participants to set up a new account on PenChecks' NextLevel IRA platform.

NextLevel IRA connects seamlessly with iJoin to present the investor a **goals-based user experience** and gives them continued access to **managed advice**.

After an IRA is set up, you'll find it easy to use iJoin's advisor analytics and communication tools to continue to provide education, nurture relationships, and deliver value.

IRA Clarity is an unparalleled end-to-end solution to help advisors retain IRA rollover assets.

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