



# A Success Map for Retirement Plan Advisors

If your goal is to be competitive in the retirement plan market ahead, you'll need to deliver more than a solid, cost-efficient service. You'll need to demonstrate how you deliver on the promise of helping produce better participant outcomes.

With **iJoin**, you will immediately differentiate your service model through a highly personalized, goal-based experience for employees and be able to report on plan success metrics that underscore your long-term value to a plan sponsor.

1

**Goal-based approach  
to engagement and  
investing**

2

**More actionable  
information to share  
with plan sponsors**

3

**New ways to directly  
communicate with  
plan participants**

# iJoin's Analytics Dashboard gives you an "all-plans" snapshot of participation, savings rates, and savings success (on path to reach goal).



Trends on **participation rate**, **goal completion percentage**, and **match optimization** produce actionable **plan health** and **participant success metrics** for you to share at your next plan sponsor meeting.



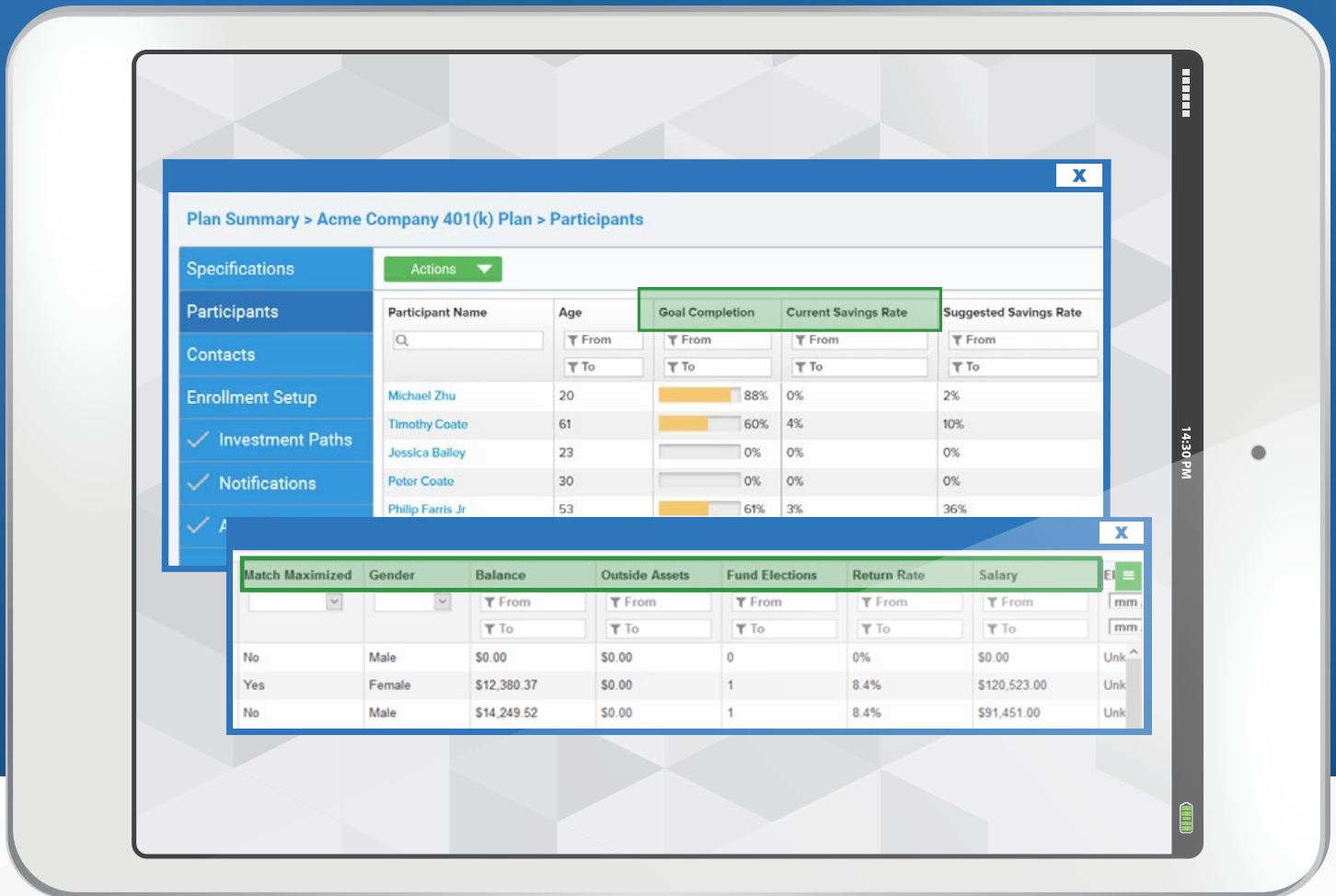
**iJoin's Plan Health Report** quantifies period over period performance trends that underscore your value.

- ✓ Employee pool - participation
- ✓ Goal success by age group
- ✓ Participation by age group
- ✓ Performance by age group
- ✓ Percent maximizing match
- ✓ Investment analysis
- ✓ Terminated with Balance

Data integration with the plan recordkeeping system creates the opportunity for a highly personalized participant experience.

**That translates to immediately actionable data for you.**

Drill down to access participant level data that reveals more information about savings behaviors and suggests messaging campaign topics.

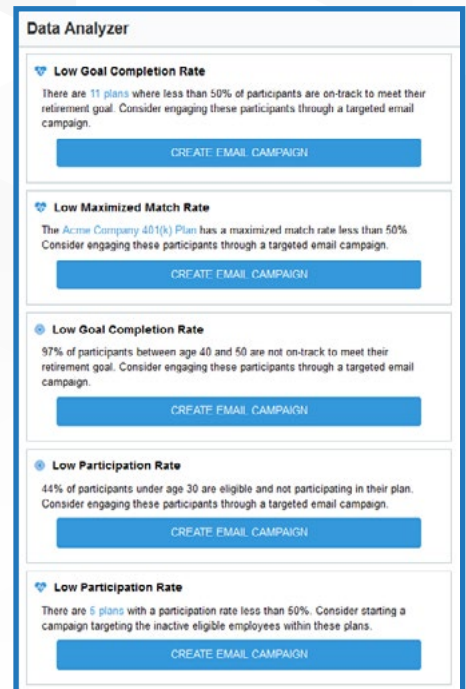


## Communication Is Everything!

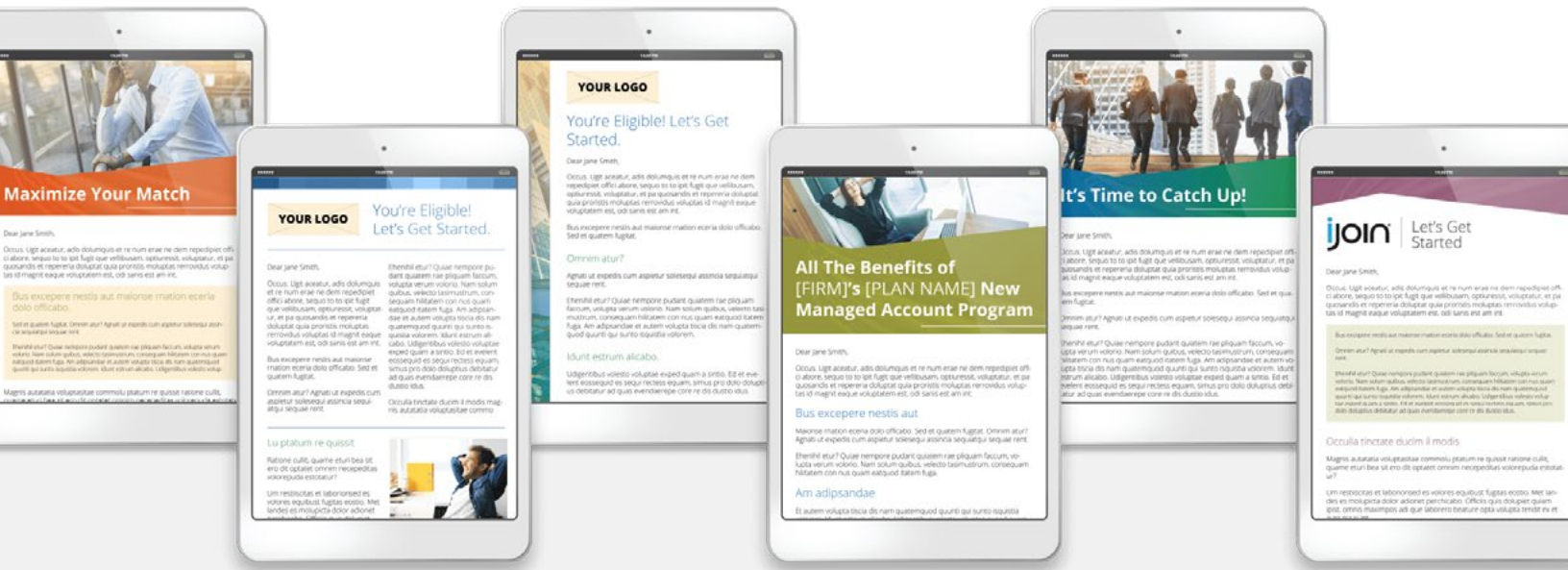
You know how critically important communication is in setting expectations, helping clients understand the value of long-term investing, and reinforcing the quality of the relationship they have with you. Until now, it's been very hard to produce sophisticated email campaigns at the participant level.

**iJoin's Data Analyzer** connects to the built-in **Email Campaign Builder** and gives you the ability to reach every participant in every plan with just a few clicks.

Drive value and engage with participants through event or criteria-based campaigns.



Target people with timely messages that **encourage successful savings behaviors**. Put your brand and message forward at regular intervals and at important moments in their financial life.



## Use Criteria or Plan-based Selections

- ✓ Eligible, but not participating
- ✓ Haven't visited in [X] days
- ✓ Are not maximizing match
- ✓ Will become eligible (iJoin Intro)
- ✓ Introduce / reinforce MAP
- ✓ Short of Goal (by Age Groups)
- ✓ Short of Goal (by Income Bracket)
- ✓ Terminated w/ a balance
- ✓ Long-term investor (COVID-19)
- ✓ Dollar Cost Averaging (COVID-19)

**Messages link to iJoin or participant portals to take next steps.**

**Schedule one-time or multi-message campaigns to reach participants across plans.**

Email campaigns are fully hosted on iJoin and require no setup or maintenance.

Message templates may be partner-branded and are fully editable.

You are the named email sender.

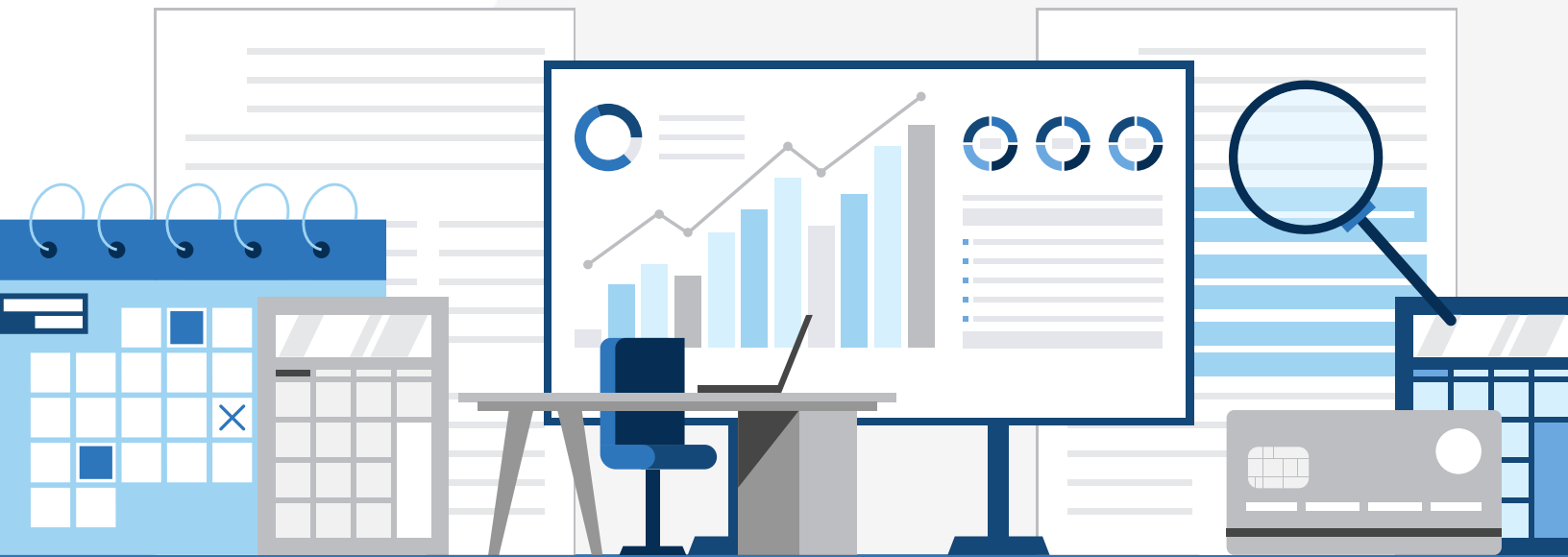
# Enhance Your New Plan Business Model

Add **iJoin** to your plan proposals to demonstrate how you deliver on the mission of better outcomes by focusing on behaviors and trends that help produce **long-term success**.

## Deliver on the Promise of Better Participant Outcomes

**iJoin** gives you an immediate competitive advantage by delivering better enrollment, re-enrollment, and engagement experiences. **iJoin** is a better way to help people answer questions about how much to save for retirement.

**iJoin** will help you deliver a better experience for those you serve and demonstrate the value you bring!



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Visit us at [iJoinSuccess.com](https://www.iJoinSuccess.com)

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