Join VIEW&ACT

Immediately actionable plan and participant data and analytics at your fingertips.

	VIEW All-plan view of critical plan success metrics	ACT Actionable data for meetings and engagement campaigns
All-Plan Dashboard View View activity across all plans		
Plan-Level Success Metrics Analysis Understand critical data and trends		
Plan Goal Completion Rate Match Optimization Rate Total Plan Assets Plan Average Contribution Rate		
Plan vs. Industry Benchmarks Plan vs. Global Benchmarks		
Participant-Level Plan Health Metrics Insights on participant actions and goal progress		
Personal Gap-to-Goal[™] Report Gap analysis of retirement funding goal		
Plan-Level Health Report Create reports for employer meetings		
Branded Email Campaigns Encourage savers to act (See Page 2)		

iJoin 14646 N. Kierland Blvd. Suite 125 Scottsdale, AZ 85254 (480) 300-4900

Visit us at iJoinSuccess.com



Branded Email Campaigns

With iJoin, you can easily send branded email messages that reinforce your relationship and encourage savers who are not on track to take simple steps to improve their path.

Use our email templates to start one-time or recurring campaigns based on known at-risk criteria. including:

- Eligible, but not participating
- Short of goal (general)
- No iJoin visits in x days
- Not maximizing match
- Forthcoming eligibility / iJoin intro
- Introduce / reinforce iJoin MAP
- Short of goal (by age groups)
- Short of goal (by income bracket)
- Terminated with a balance

Great start! Now, let's get you closer to your goal! Hi Firstname, Since you're participating in your reti plan, you are contributing to your ret success. That's great, but it looks like pretty far from saving enough to be c MORE MONEY for you! fund your goal. There are several way the gap. You could save more. You ca

> The key is to make changes as soon a so that your investments have as ma possible to work for you. Log in to ilo see your progress and understand th potential impact of making positive c

longer.

Hi Firstname.

When you contribute to your retireme plan, so does your employer. It's called a matching contribution. Based on your current savings rate, you're not getting as much of a match as you could.

Log in to iloin now to see how much more you could be getting by increasing your deferral rate. It could make a big difference in helping you fund your retirement goal.

Take a look now and see

You can also design your own custom email messages and templates and target recipients based on custom selection criteria.

The Power to Personalize.™

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