

# iJoin® 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
<b>All-Plan Dashboard View</b> <i>View activity across all plans</i>	✓	✓
<b>Plan-Level Success Metrics Analysis</b> <i>Understand critical data and trends</i>	✓	✓
Plan Goal Completion Rate Match Optimization Rate Total Plan Assets Plan Average Contribution Rate	✓	✓
Plan vs. Industry Benchmarks Plan vs. Global Benchmarks		✓
<b>Participant-Level Plan Health Metrics</b> <i>Insights on participant actions and goal progress</i>		✓
<b>Personal Gap-to-Goal™ Report</b> <i>Gap analysis of retirement funding goal</i>		✓
<b>Plan-Level Health Report</b> <i>Create reports for employer meetings</i>		✓
<b>Branded Email Campaigns</b> <i>Encourage savers to act (See Page 2)</i>		✓

# Branded Email Campaigns

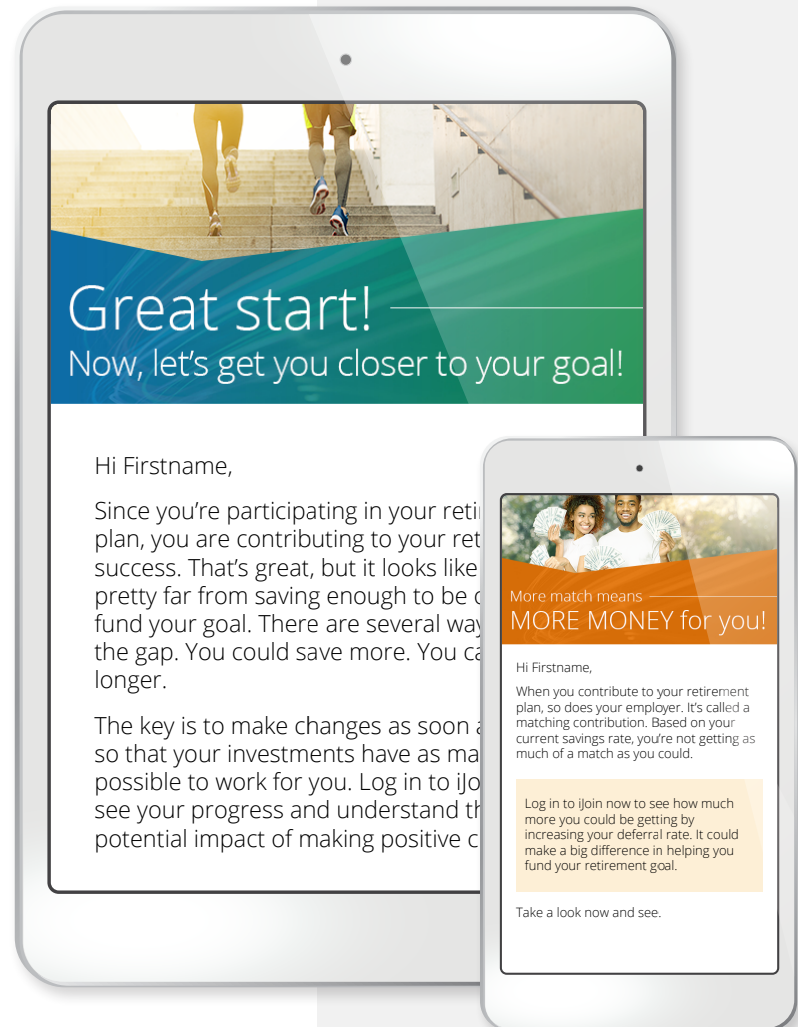
With **iJoin**, you can easily send branded email messages that reinforce your relationship and encourage savers who are not on track to take simple steps to improve their path.

**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

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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