

> **Find 401(k) plans ready for a change and win the business with field-tested prospecting strategies and market data for retirement plan sales professionals.**



OVERVIEW:

Retirement Plan Prospector provides sophisticated defined contribution and defined benefits sales prospecting and plan analysis tools to drive your sales.

- Plan Score Card, Red Flags, Performance-Based Benchmarking and other strategic resources
- Every form 5500, available immediately after the DOL releases it
- CRM-friendly export
- Graphic-Rich Report Builder
- 500+ search fields in an intuitive filtering tool



What is Retirement Plan Prospector?

Retirement Plan Prospector is an intuitive and comprehensive online sales prospecting and plan analysis tool, providing insights into the 401(k) and pension markets. Prospector enables you to find qualified leads that are similar to your best customers, identify potential new market opportunities and win the business.

Prospector takes the lessons learned from our most successful clients and delivers them directly to you. Subscriptions are available for individual states, regions or national access. Prices vary based on geographic area and number of users.

Connect with one of our knowledgeable reps today.

Call 800-231-0669, option 1 | Email sales@judydiamond.com

Visit www.judydiamond.com/retirementplanprospector



What does the Retirement Plan Prospector include?

- Current and historical form 5500 disclosure filings collected directly from the Department of Labor
- More than 500 different searchable fields in the simplest, most intuitive search tool in the industry
- Exclusive plan analysis tools to help you find the most qualified leads, including:
 - **Red Flags:** Indicate possible problems in a plan's design or evolving needs
 - **Plan Scores:** Summarizes a plan's value as a prospect in a single score out of 100, allowing comparison of an individual plan against all other plans in the same state, same industry, with a similar asset level
 - **Performance-Based Benchmarking:** Use existing clients as peer group, and show potential clients what they could be achieving
 - **Dynamic Sales Talking Points and Marketing Letters** on plan issues
 - **Plan Analysis** calculating metrics for your entire search results in real time
- Unique contact information, including names, email addresses and titles of up to three plan decision-makers (HR directors, benefits managers, CFOs)
- Graphic-rich Report Builder allows you to customize presentation-ready plan reports. Be prepared for your next client meeting in seconds.
- CRM-friendly Export means that any of our plan data can be uploaded into your other databases smoothly.

The image displays three overlapping screenshots of the Retirement Plan Prospector software interface:

- Report Builder (Left):** Shows the 'Generate Report' screen. It includes a sidebar with navigation options like 'ACTUARY INFORMATION', 'SPONSOR SUMMARY', 'BENCHMARK', 'MARKETING LETTERS', 'PLAN REPORT', and 'RECENTLY VIEWED PLANS'. The main area is titled 'Build a Presentation-Ready Report' and lists various report sections such as 'Contact Information', 'Plan Type Features', 'Plan Financials', 'Plan Providers', 'Red Flags', 'Plan Scorecard', 'Actuary Information', 'Sponsor's Other Plans', 'Plan Participants', 'Sponsor Summary', and 'Talking Points'. A preview of a report for '02 PARTNERS LLC' is shown at the bottom.
- Benchmark (Right):** Shows the 'Benchmark' screen. It prompts the user to 'Select a Peer Group to Benchmark this Plan against'. Below this, there is a table comparing metrics:

Metric	Plan Value	Peer Group Value	Difference
Total Assets	\$824,562	\$900,101	-\$15,481
Rate of Return	8%	6%	2%
Participation Rate	83%	86%	-3%

 Below the table is a 'Participant Rate' bell curve chart.
- Plan Scorecard (Bottom Center):** Shows the 'Plan Scorecard' for a specific plan. It features a large 'NATIONAL PLAN SCORE' of 26. Below the score is a 'Plan Score Barometer' with horizontal bars comparing the plan's score to benchmarks:

Metric	Score
This Plan's Score	26
State Average	59
Industry Average	59
Average of Plans with Similar Asset Size	57
Average of Plans with Similar Participant Size	63

 At the bottom, there is a table with columns for 'METRIC', 'ACTUAL VALUE', and 'RANK out of 100'.

Report Builder




















Benchmark

Plan Scorecard

Retirement Plan Prospector offers 2 levels of access:

 Retirement Plan
Prospector Basic

 Retirement Plan
Prospector+

IDENTIFY LEADS	500+ Searchable Data Elements		
	Red Flag Plan Performance		
	Export Capabilities		
	Detailed Plan Financials		
CLOSE LEADS	Contact Information		
	Report Generation		
	Plan Scorecards	 (National)	 (National + State + Industry + Plan Size)
	Performance-based Benchmarking		
	Pre-generated Talking Points		
	Dynamic Marketing Letters		
STRATEGIC ANALYSIS	Map-Based Insights		
	Industry Plan Research & Analysis		



Who should consider using Retirement Plan Prospector?

Individual advisors and DCIO or other fund company personnel who need to find and research qualified retirement plan leads (401(k), pension and other DB or DC plans).



Request a Free Trial

Find out if the Retirement Plan Prospector is the right solution for your team's lead generation and plan analysis needs.

Visit www.judydiamond.com/retirementplanprospector

Call 800-231-0669, option 1 | Email sales@judydiamond.com



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