Retirement Plan **Prospector**

Improve your market position 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 profits.

- Plan Score Card, Red Flags, Recommended Prospects and other strategic resources
- Every form 5500, available immediately after the DOL releases it
- CRM-friendly export
- Graphic-Rich Report Builder
- 400+ 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 and to identify potential new market opportunities. From searching for plans that exhibit Red Flags to crafting sales pitches based on the Plan Score Card, users discover retirement selling best practices are embedded in every corner. 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.

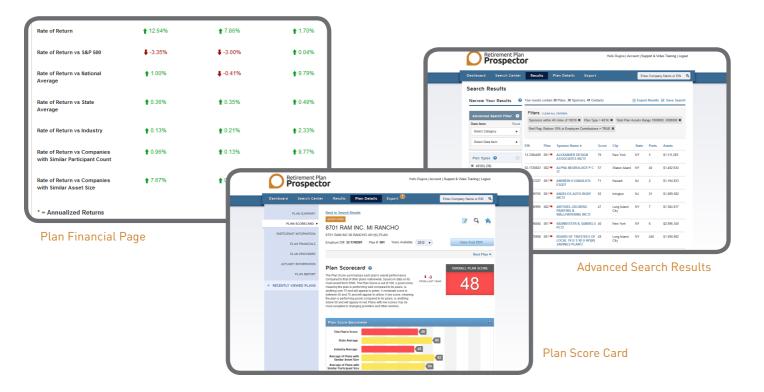
Connect with one of our knowledgeable reps today.

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 400 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: o **Red Flags**: Indicate possible problems in a plan's design or evolving needs
 - o Plan Score: Summarizes a plan's value as a prospect in a single score out of 100
 - o Plan Score Barometer: Compares a given plan's score to that of its peers
 - o **Recommended Prospects**: Plans in your territory that we identify for you as good prospects to consider
 - o **Recommended Searches**: Execute pre-built advanced searches with a single click
 - o Historical Trends and Comparisons: Indicate key metrics on how a plan's performance has changed over one, three and five years, plus how it compares to its peers
- 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.



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 (401k, 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.

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