



> 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.

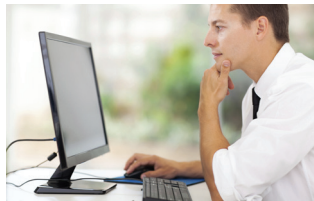
The image displays three overlapping screenshots of the Retirement Plan Prospector software interface. The top-left screenshot shows the 'Generate Report' screen, which includes a sidebar with navigation options like 'ACTUARY INFORMATION', 'SPONSOR SUMMARY', 'BENCHMARK', 'MARKETING LETTERS', 'PLAN REPORT', and 'RECENTLY VIEWED PLANS'. The main content area is titled 'Build a Presentation-Ready Report' and lists various report components 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. Below this is a preview of a report for '02 PARTNERS LLC' with the text 'This is what your report will look like!'. The top-right screenshot shows the 'Benchmark' screen, where a user can select a peer group to benchmark against. It displays a comparison table for '02 PARTNERS LLC vs Peer Group (1,512 plans)' with metrics like Total Assets, Rate of Return, and Participation Rate. Below the table is a 'Participant Rate' bell curve chart. The bottom-center screenshot shows the 'Plan Scorecard' for '02 PARTNERS LLC', featuring a 'NATIONAL PLAN SCORE' of 26 and a 'Plan Score Barometer' comparing the plan's score to state, industry, and similar asset size averages.

Report Builder

Benchmark

Plan Scorecard

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.

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