



**APB RETIREMENT**

# A Success Map for \_\_\_\_\_ Retirement Plan Advisors

If your goal is to be competitive in the retirement plan market ahead, you'll need to deliver more than a solid, cost-efficient service. You'll need to demonstrate how you deliver on the promise of helping produce better participant outcomes.

**Immediately differentiate** your service model through a highly personalized, goal-based experience for employees and be able to report on plan success metrics that underscore your long-term value to a plan sponsor.

**1**

Goal-based approach  
to engagement and  
investing

**2**

More actionable  
information to share  
with plan sponsors

**3**

New ways to directly  
communicate with  
plan participants

Our **Analytics Dashboard** gives you an “all-plans” snapshot of participation, savings rates, and savings success (on path to reach goal).



Trends on **participation rate, goal completion percentage,** and **match optimization** produce actionable **plan health** and **participant success metrics** for you to share at your next plan sponsor meeting.



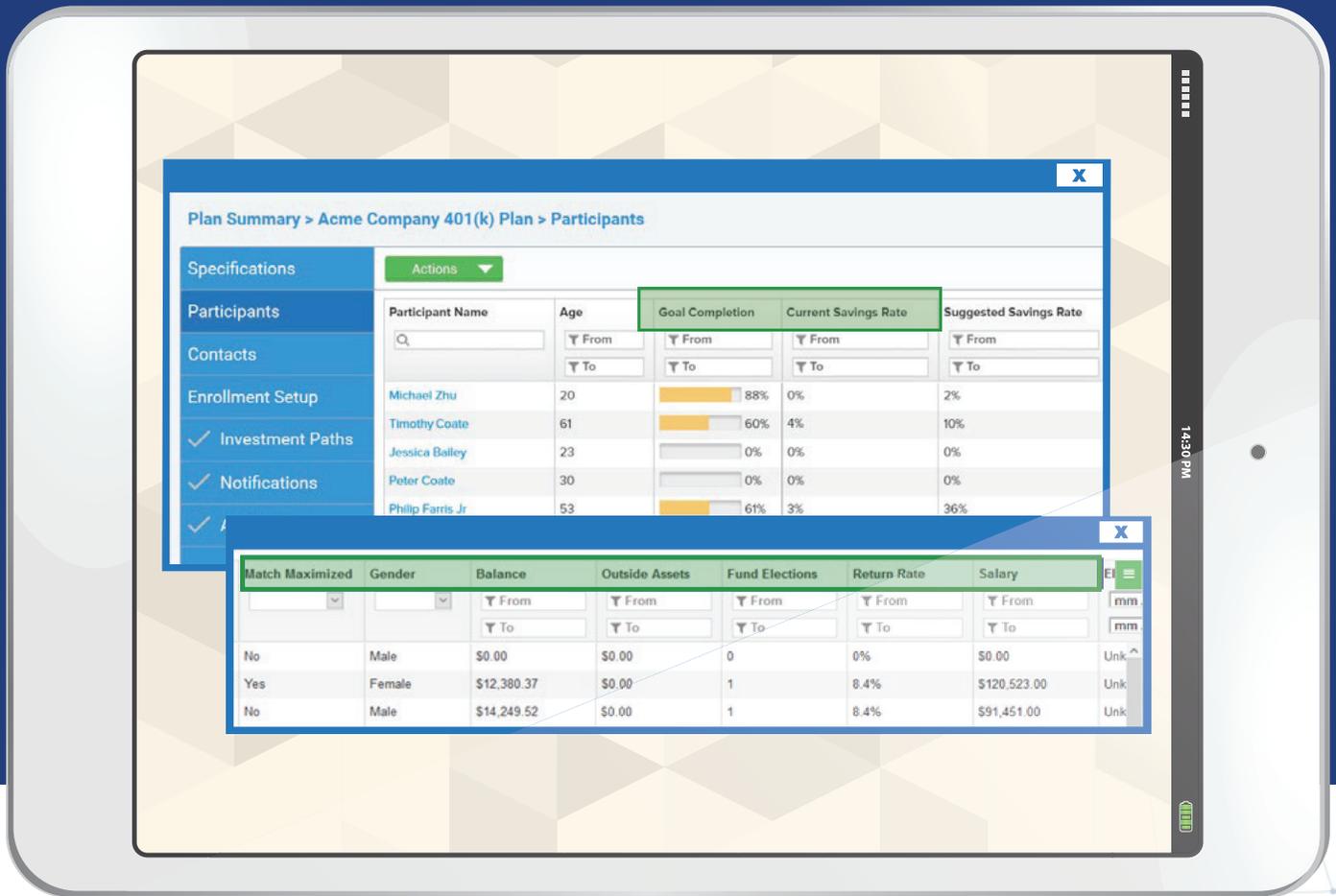
Our **Plan Health Report** quantifies period over period performance trends that underscore your value.

- ✓ Employee pool – participation
- ✓ Goal success by age group
- ✓ Participation by age group
- ✓ Performance by age group
- ✓ Percent maximizing match
- ✓ Investment analysis
- ✓ Terminated with Balance

Our powerful online platform powered by **iJoin**, seamlessly integrates data with the plan recordkeeping system creating the opportunity for a highly personalized participant experience.

**That translates to immediately actionable data for you.**

Drill down to access participant level data that reveals more information about savings behaviors and suggests messaging campaign topics.



## Communication Is Everything!

You know how critically important communication is in setting expectations, helping clients understand the value of long-term investing, and reinforcing the quality of the relationship they have with you. Until now, it's been very hard to produce sophisticated email campaigns at the participant level.

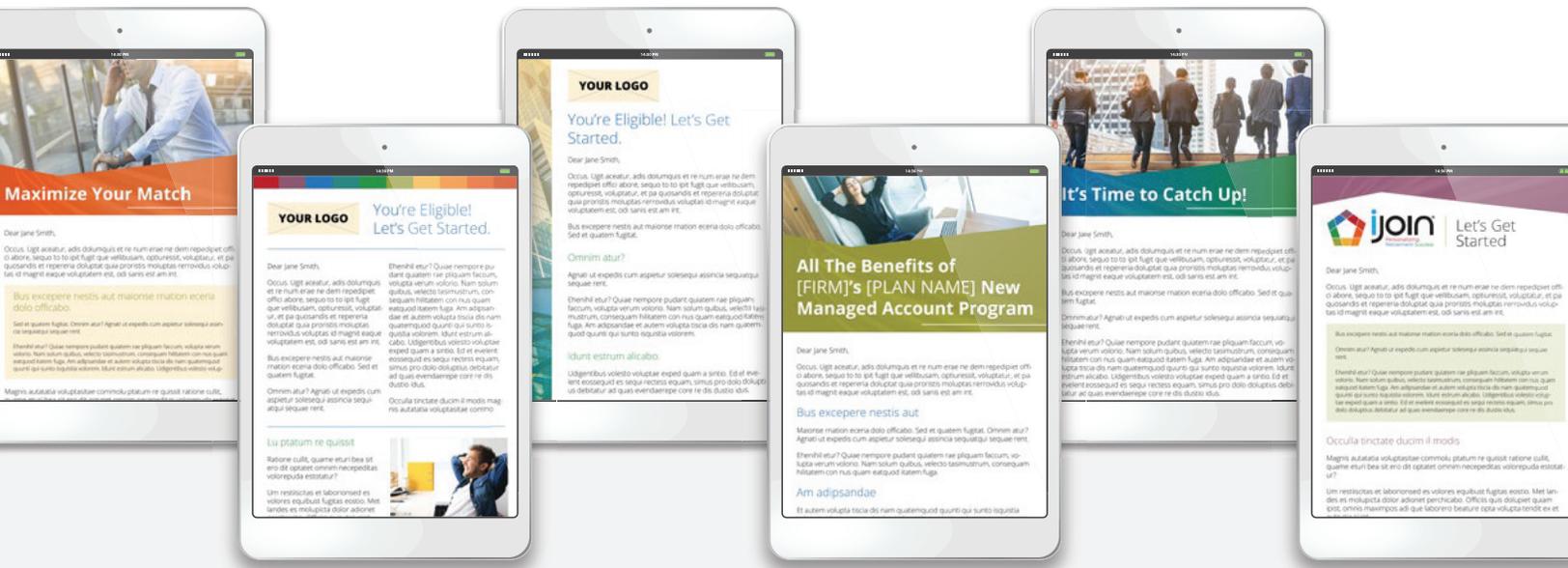
Our **Data Analyzer** connects to the built-in **Email Campaign Builder** and gives you the ability to reach every participant in every plan with just a few clicks.

Drive value and engage with participants through event or criteria-based campaigns.

The Data Analyzer interface displays five campaign suggestions:

- Low Goal Completion Rate**: There are 11 plans where less than 50% of participants are on-track to meet their retirement goal. Consider engaging these participants through a targeted email campaign. [CREATE EMAIL CAMPAIGN](#)
- Low Maximized Match Rate**: The Acme Company 401(k) Plan has a maximized match rate less than 50%. Consider engaging these participants through a targeted email campaign. [CREATE EMAIL CAMPAIGN](#)
- Low Goal Completion Rate**: 97% of participants between age 40 and 50 are not on-track to meet their retirement goal. Consider engaging these participants through a targeted email campaign. [CREATE EMAIL CAMPAIGN](#)
- Low Participation Rate**: 44% of participants under age 30 are eligible and not participating in their plan. Consider engaging these participants through a targeted email campaign. [CREATE EMAIL CAMPAIGN](#)
- Low Participation Rate**: There are 5 plans with a participation rate less than 50%. Consider starting a campaign targeting the inactive eligible employees within these plans. [CREATE EMAIL CAMPAIGN](#)

Target people with timely messages that **encourage successful savings behaviors**. Put your brand and message forward at regular intervals and at important moments in their financial life.



## Use Criteria or Plan-based Selections

- ✓ Eligible, but not participating
- ✓ Haven't visited in [X] days
- ✓ Are not maximizing match
- ✓ Will become eligible (iJoin Intro)
- ✓ Introduce / reinforce MAP
- ✓ Short of Goal (by Age Groups)
- ✓ Short of Goal (by Income Bracket)
- ✓ Terminated w/ a balance
- ✓ Long-term investor (COVID-19)
- ✓ Dollar Cost Averaging (COVID-19)

Messages link to **iJoin** or participant portals to take next steps.

Schedule one-time or multi-message campaigns to reach participants across plans.

Email campaigns are fully hosted on iJoin and require no setup or maintenance.

Message templates may be partner-branded and are fully editable.

You are the named email sender.

## Enhance Your New Plan Business Model

Your plan proposals will demonstrate how you deliver on the mission of better outcomes by focusing on behaviors and trends that help produce **long-term success**.

## Deliver on the Promise of Better Participant Outcomes

Get an immediate competitive advantage by delivering better enrollment, re-enrollment, and engagement experiences. We offer better way to help people answer questions about how much to save for retirement.

Together we will help you deliver a better experience for those you serve and demonstrate the value you bring!

