



## **BUSINESS EVALUATION TOOLS FOR CLIENT-FACING TEAMS AND ADVISORS**

UtopiaAdvisor is a business-practice software providing an executive dashboard of plan review applications for an advisor's entire book of business. Our application suite allows advisors to evaluate data and easily pivot from one topic to the next as discussions change and evolve.

Each tool makes real-time calls to a single source of aggregated plan and investment information. These calls put data at your fingertips allowing you to create a message that is understandable and meaningful. Our arsenal of tools allows you to dynamically evaluate and present plan metrics, and then deliver a comprehensive document, so that decisive action may be taken.

With UtopiaAdvisor's data and visualization tools, client teams can evaluate investment and plan health on-demand, make actionable suggestions and be a trusted advisor in the eyes of the client.

## **UTOPIAADVISOR BENEFITS**

Improve plan and investment monitoring, account retention and new business practices:

- Enhance practices and practice management
- Validate your expertise
- Provide a completely digital experience
- Prove your actions, tasks and recommendations with archives, records and back-up
- Simplify your technology, and move on from cumbersome legacy tools and habits
- Easily access information to save time, effort and money
- Lead client plan reviews and participant outcome discussions
- Arm teams with client-facing tools
- Transform the profitability of your practice and of every plan



### KEY ADVISOR PRACTICE SOLUTIONS

- Book of Business Dashboard

### COMPREHENSIVE INVESTMENT REVIEW

- Fund Monitoring
- Watchlist criteria builder
- Fund comparison
- Plan Investment Line-Up Proposal Builder
- Expense and Revenue management
- Interactive fact sheets
- Fiduciary Checklist
- Fund and fund line-up scoring
- Investment client reporting and presentation

### COMPREHENSIVE PLAN REVIEW

- Plan Health Snapshot
- Annual plan review
- Retirement readiness evaluator
- Plan benchmarking
- Plan scoring

### FEATURES

- Tablet and desktop compatible
- Intuitive user interface
- Third-party data access
- Proprietary data access
- Document management vault
- Standardized workflows
- Data export and import utilities
- API index for IT developers
- Information management and master editing
- Practice management & compliance
- Advisor activity documentation

### BUILT FOR ENTERPRISES AND INDEPENDENT USERS

- Advisors
- Recordkeepers
- Broker Dealers
- RIAs
- Custody Platforms
- DCIO

### About Fluent

Fluent Technologies offers cloud-app solutions dedicated to the management, delivery and presentation of investment and plan information. Fluent transforms complex and disparate data sources into meaningful and actionable information. The company's mission is to create technology that simplifies the compilation and use of client-facing product performance information. [www.fluenttech.com](http://www.fluenttech.com)



### CONTACT US

For more information, a product demo and an analysis of how we can help you energize your client meetings, please contact us at 781-939-0900, or [info@fluenttech.com](mailto:info@fluenttech.com).