

## INVESTMENT REVIEW

Your client meetings have become interactive discussions with expectations for dynamic content. Yet the tools commonly available have not kept pace with today's expectations. UtopiaAdvisor's investment review suite gives you a comprehensive fund line-up analysis, followed by good communications and reporting, and includes fact sheets and fund monitoring results. UtopiaAdvisor gives you all the tools you need to wow your clients in one platform.

With UtopiaAdvisor you have the six essential tools that you need in one integrated platform to use on the fly, during your client meeting, including:

### 1 IPS Watchlist Criteria Builder

- Set criteria most important to you
- Monitor product and plan criteria
- Use weighted percentage or number criteria

### 2 Fund Monitoring

- Alerts for immediate action
- Investment reporting
- Dynamic criteria monitoring
- Look up peer group funds
- Visually compare alternatives
- Obtain/save research as a record
- Fund scoring

### 3 Fund Line-up Proposal Builder

- Set up unique plan solutions for new business practices
- Select funds or import line-ups
- Perform due diligence on existing plan line-ups
- Compete in take-aways
- Save as models or create products
- View and compare fund alternatives
- Stress test against IPS
- Compare and measure fees, expenses and revenue
- Fund line-up scoring

### 4 Fund Comparison

- Analyze & compare funds and save for future reference
- Deeper-dive analysis beyond IPS criteria
- Comparison reports
- Archive reports
- Fund commenting
- Compare with IPS rules

### 5 Fiduciary Checklist

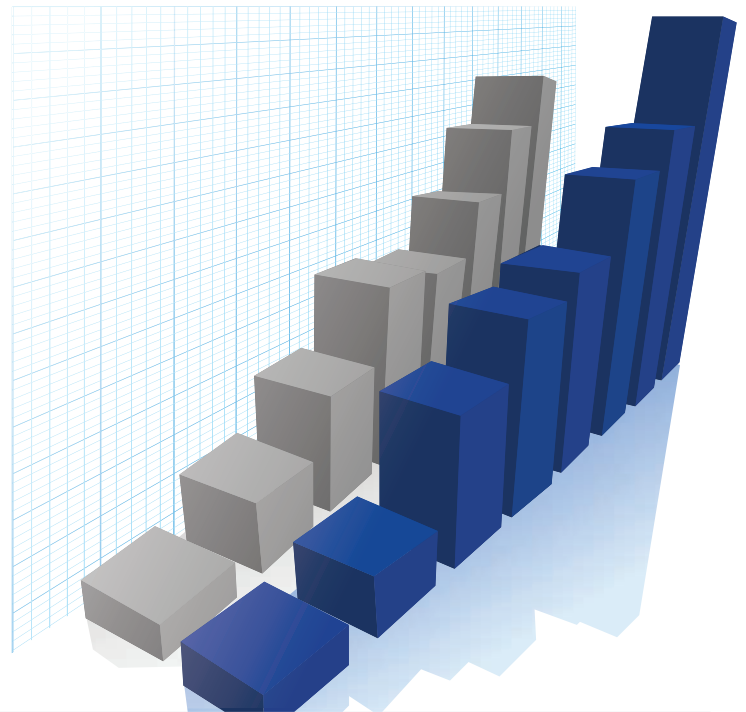
- Confirm compliance
- Research and sharing evidence capture tool
- Documented actions & history
- Download activity reports
- Checklist confirm to all steps required and completed
- Aggregated comments
- Fee, Expense and Revenue check

### 6 Fact Sheets

- Easy-to-read layout
- Comprehensive
- Available as HTML with links to deeper data
- Available as PDFs

Fund monitoring, and fee and expense reporting are well established and regulated. Yet, we find that the tools supporting those practices are old, disconnected, inefficient and do not help the advisor bring the best value to the plan sponsor.

Compare the UtopiaAdvisor suite to the tools you are using today. We are confident you will recognize the difference. It *will* position you as the *trusted advisor*.



### About UtopiaAdvisor

*Business evaluation tools for client-facing teams and advisors*

UtopiaAdvisor is a secure cloud-based application that provides client-facing teams and advisors with up-to-date investment product and plan information. Our application suite allows users to evaluate data for discussions with clients, dynamically prepare presentations, and pivot from one topic to the next easily as discussions change and evolve. With UtopiaAdvisor's data and visualization tools, your teams can evaluate investment and plan health, make actionable suggestions and be a trusted advisor in the eyes of your client. UtopiaAdvisor is designed to support advisors and relationship managers who are focused on plan investment suggestions, account management, and new business acquisition.

### 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).