



	ENTERPRISE PLAN REVIEW SUITE LICENSING	ENTERPRISE INVESTMENT REVIEW SUITE LICENSING
Application Components	<p><i>Includes Cloud Applications and Reporting</i></p> <ul style="list-style-type: none"> • Book of Business Dashboard • Plan Health Snapshot <ul style="list-style-type: none"> - Goals & measures, scoring • Retirement Readiness <ul style="list-style-type: none"> - Deferral gaps, replacement ratios, income projections, scoring¹ • One-View Plan Information Management • UtopiaAdvisor Plan Scoring • Plan Design/Services RFP 	<p><i>Includes Cloud Application Services and Reporting</i></p> <ul style="list-style-type: none"> • Book of Business Dashboard • Fund Monitoring <ul style="list-style-type: none"> - Watchlist criteria builder, monitoring and notifications - Fund comparison & alternative selector • Scoring <ul style="list-style-type: none"> - Fund specific, line-up weighted average • Plan Investment Line-up Proposal Builder <ul style="list-style-type: none"> - Retention review, take-away & new business - Expense & Revenue calculator • Fiduciary Checklist <ul style="list-style-type: none"> - Practice archives & reporting • UtopiaAdvisor Fact Sheets <ul style="list-style-type: none"> - HTML & PDF
Additional Application Services	Annual Plan and Investment Review Publishing	
Optional Component Applications	Plan participant metrics with or without Investment Review	Plan Design/Services RFP ¹

LICENSING FEATURES & WARRANTIES	
Features	<ul style="list-style-type: none"> • Reports configuration & branding • System reporting • User administration • Contact management • Communication (email & alert) • Documentation
Utilities	<ul style="list-style-type: none"> • API Web Services² <ul style="list-style-type: none"> - Plan data, payroll data, CRM data, fund data, Fees & Expenses data, Revenue Share data • Import/Export Config tool <ul style="list-style-type: none"> - Upload alternatives to APIs, participant aggregation
Warranty Services	Updates, upgrades, customer service

UTOPIAADVISOR PRODUCT MODULES, SERVICES & WARRANTIES

OPTIONAL ADDITIONAL SERVICES & RESOURCES

Resale Resources Third-party Data & Intelligence Licensing*	<ul style="list-style-type: none">• Plan benchmarks• Fee benchmarks• Fund returns data & index data• 5500 search services
Additional Tools	Add-on Features <ul style="list-style-type: none">• Publishing software - Report Template Designer
Consulting Services	Hourly Fee-based Services <ul style="list-style-type: none">• Market research/Thought leadership• Requirements analysis & formation• Integration & implementation• Template design• Data analysis• Content creation• Application configuration• Technical support (IT)• Web page development• Account management services

* Resale services of third-party data and intellectual property vary in terms and fees. Alternatively, Fluent will work to leverage client license agreements, and integrate their data into our tools

¹ Integrate with Investment Proposal

² Fee, Expense & Revenue Share data, if aggregated, is part of fund data API

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



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.

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