



ABOUT PLAN HEALTH

If you are using reports, PowerPoint and documents to conduct a plan review meeting, then you are missing the opportunity to deliver value to your clients.

With the Plan Health app through UtopiaAdvisor, you will have one cohesive technology with all data seamlessly integrated. UtopiaAdvisor's tools will position you to quickly assess plan health, identify gaps, take action and see results.

Move from passive reporting of inflexible, obsolete information to actively providing meaningful information that measures success and supports solid decisions. Demonstrate plan objectives that meet anticipated needs. And show that you are the expert, trusted advisor.

DO YOUR PLANS MEASURE UP?

Advisors need better tools for their clients – tools that help them be concise and focus on the critical issues of the plan. This means tools that do more than review funds, and can display what you need when you need it.

PLAN HEALTH FEATURES

- A dynamic dashboard for collaboration with the plan sponsor
- A goal setting tool that gives instant views of plan metric success (or problem areas)
- A presentation tool that can respond to unexpected questions and display answers
- A flexible report that is configurable to whatever metrics are important and delivered on-demand
- A suite of practice management tools that document and archive meetings
- A robust set of metrics ranging from participation, and plan cash flow to retirement readiness



YOUR DYNAMIC MEETING TOOL

Quickly distinguish your service and expertise with tools that deliver:

- Real-time delivery of plan and investment information to your digital device
- Interactive presentations that focus on the issue in a meaningful way to sponsors
- Configuration manager to select any plan metric you want to focus on and drill into
- On-demand response features to answer the unexpected question
- Actionable take-aways to put decisions into play

YOUR LOGIC:

SUCCESS MEASURES & BENCHMARKING

Set realistic goals and get a bigger picture of the plan's health.

- Set goals for plan metrics in our Goal Settings control manager
- See instant results with our Plan Health dashboard and quickly identify lagging metrics

- Access third-party benchmarking, for goal setting or for informational purposes
- Evaluate, draw meaningful conclusions, and take action

YOUR DOCUMENTATION SOLUTION

While you interactively present concise information and adeptly respond to questions, UtopiaAdvisor is working in the background, helping you document your client activity and generate the best reports to reflect your discussions and client review practices.

DEMONSTRATE PROGRESS & YOUR VALUE

Stop relying on static documents, reports or PPTs and present what is on your mind.

- Easily show progress with charts that convey your evaluation and the trend's results
- Demonstrate the effectiveness of education campaigns by bringing in records of education activities and show how they have moved the dial for the relevant metric
- Use our multi-component Plan Health Score for objective comparisons and justify changes to plan design

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.