



A COMPLETE PRACTICE MANAGEMENT TOOLKIT FOR RETIREMENT PLAN ADVISORS

UtopiaAdvisor stands out from other advisor software because it couples the plan health with investment review for a more complete practice management package. It provides an executive dashboard of applications for an advisor's entire book of business. Our dual application suite allows advisors to evaluate plan 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 meaningful and compelling. 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
- Alerts and notifications

COMPREHENSIVE INVESTMENT REVIEW¹

Investment Retention Applications

- IPS Watchlist criteria builder
- Fund Monitoring
- Fiduciary Checklist
- Fund line-up scoring
- Presentation and Reporting

Investment Prospecting Features

- Fund Expense and Revenue Savings Calculator
- Investment Line-up Proposal Builder
- Filter 5500 to key data points

FEATURES

- Document configuration and branding
- Mobile enabled
- Contacts directory
- Document vault
- One View™ Data Management

COMPREHENSIVE PLAN REVIEW

Plan Retention Applications

- Plan Health Snapshot
- Plan Level Participant Outcome Analyzer
- Plan scoring
- Presentation and Reporting

Plan Prospecting Features

- Plan Services and Design Proposal Builder²
- Plan Health Survey and Score Assessor²

BUILT FOR ENTERPRISES AND INDEPENDENT USERS

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

¹ Available January 2018. For advisors, the Investment Review suite requires a fee-based 3rd-party fund data source, and as such, licensing at economies of scale rates is only available through a Broker Dealer or RIA platform marketing agreement. A stand-alone license to UtopiaAdvisor's Investment Review suite can be purchased at retail level pricing that reflects the cost of the 3rd-party fund data provider. Please call for fee estimates that align with your business need.

Record keeping platforms can license UtopiaAdvisor and configure unique instances supporting proprietary strategic initiatives. In these instances, 3rd party data can be integrated under your use licensing agreement with your provider.

² Available April 2018

About Fluent

Fluent Technologies is dedicated to the management, delivery and presentation of financial information. We transform complex and disparate data into meaningful client experiences. As a leading software as a service provider in the industry, our focus is on the needs of retirement plan professionals. Our mission is to improve their practices and resources, so they can guide their sponsors and participants to informed decisions, actions and satisfaction. Our vision is that every plan provider, advisor and client is aware of their wellness position in a retirement plan benefit and can easily act to control their outcome.



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.