



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) and momentum building KPIs
- 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

- Apply 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 stands out from other advisor software because it couples the plan review with investment review for a more complete practice management package. The UtopiaAdvisor tool kit offers unique new business prospecting tools and allows plan advisors to bring more value to client meetings by focusing on what success *really* means to plan sponsors. Now Advisors can easily manage their entire book of business through repeatable and scalable practices, and lead clients through meaningful discussions that improve plan practices and outcomes.

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.