



	PLAN REVIEW SUITE LICENSING	INVESTMENT REVIEW SUITE LICENSING ¹
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 & KPI measures - Plan health scoring - Plan health checklist² • Plan Services and Design RFP² • Outcome Projector¹ <ul style="list-style-type: none"> - Plan level deferral gaps, replacement ratios and income projections • Data Upload 	<p><i>Includes Cloud Application and Reporting</i></p> <ul style="list-style-type: none"> • Book of Business Dashboard • Fund Monitoring <ul style="list-style-type: none"> - IPS Watchlist criteria builder, monitoring and notifications - Fund comparison & alternative selector • Fund Line-Up Scoring <ul style="list-style-type: none"> - Fund specific, line-up weighted average - Fund scoring • Fund Line-up Proposal <ul style="list-style-type: none"> - Fiduciary check list - Fund expense and revenue savings calculator - Fund comparison and alternatives selector • Fund Fact Sheets
Prospecting Applications	Plan Health Survey and Score Assessor ¹	Filter 5500 ¹
Common Support Applications	<ul style="list-style-type: none"> • Contacts • Document Vault • One View Data™ 	

LICENSING FEATURES & WARRANTIES	
Features	<ul style="list-style-type: none"> • Assorted client documents, configuration and branding • Mobile enabled • System reporting and data extracts
Utilities	<ul style="list-style-type: none"> • Enterprise Data Services³ <ul style="list-style-type: none"> - API and/or ETL for Plan, payroll, Contacts, fund, Fees & Expenses and Revenue Share data • Data upload tool <ul style="list-style-type: none"> - Upload alternatives to APIs, for plan and participant data aggregation
Warranty Services	Updates, upgrades, customer service, 30-day Money Back Guarantee

OPTIONAL ADDITIONAL SERVICES & RESOURCES

Resale Resources Third-party Data & Intelligence Licensing*	<ul style="list-style-type: none"> • Plan benchmarks • Fund returns data & index data • 5500 search services
Consulting Services	<p>Hourly Fee-based Services</p> <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 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 Spring 2018

³ Web services for enterprise configurations. 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 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.