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 application suite allows advisors to evaluate plan data and easily pivot from one topic to the next as meeting 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 present a message that is meaningful and compelling. Our arsenal of tools allows you to dynamically evaluate and present plan metrics, and then deliver comprehensive documents as a record of client discussions and suggested actions that may be taken.

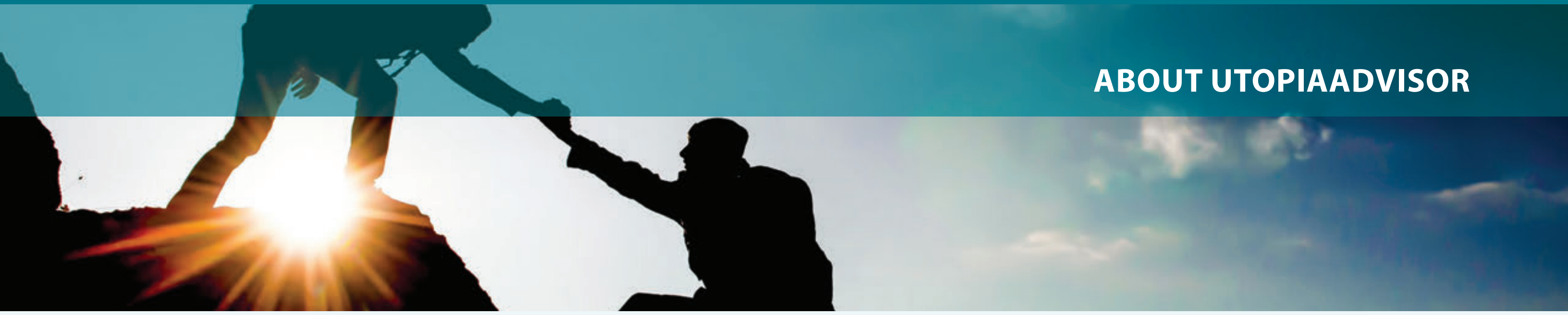
With UtopiaAdvisor's data and visualization tools, client teams can evaluate investment and plan health on-demand, make actionable suggestions and be a trusted advisor in the eyes of the client.

UTOPIAADVISOR BENEFITS

Improve plan and investment monitoring, account retention and new business practices:

- Enhance practices and practice management
- Demonstrate your value and expertise
- Provide your customers a 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

UTOPIAADVISOR, YOUR SOLUTION FOR ENERGIZING CLIENT MEETINGS.



ABOUT UTOPIAADVISOR

KEY ADVISOR PRACTICE SOLUTIONS

- Book of Business Dashboard
- S.W.O.T.* Indicators

COMPREHENSIVE INVESTMENT REVIEW[1]

Investment Retention Applications

- IPS Watchlist Criteria Builder
- Fund Monitoring
- Fiduciary Checklist
- Fund Line-Up Scoring
- Presentation and Reporting

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

BUILT FOR ENTERPRISES & INDEPENDENT USERS

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

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*Strengths, weaknesses, opportunities and threats.

[1] For advisors, the Investment Review suite requires a fee-based 3rd-party fund data source. Licensing at economies of scale rates is only available through a Broker Dealer or RIA platform marketing agreement. 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.

About Fluent

Fluent is a FinTech company that develops software solutions for the Investment Community. We focus on the needs of retirement plan professionals. We are entrepreneurs and innovators, with direct industry work experience and consumers of the industries products and services. We are committed to solving problems and addressing market trends and bring nearly 25 years of successful client outcomes. Our mission is to improve the practices and resources of plan professionals, 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 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.

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