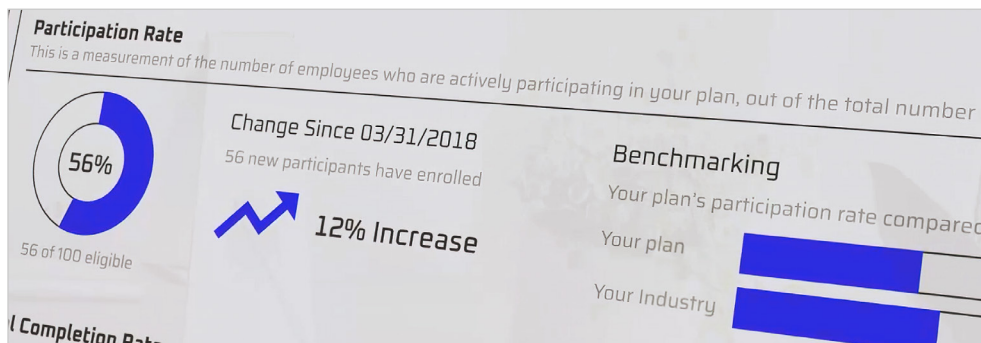


Plan Health Analytics and Targeted Communications That Drive Success

If your goal is to be competitive in the retirement plan market ahead, you'll need to deliver **more** than a solid, cost-efficient service.



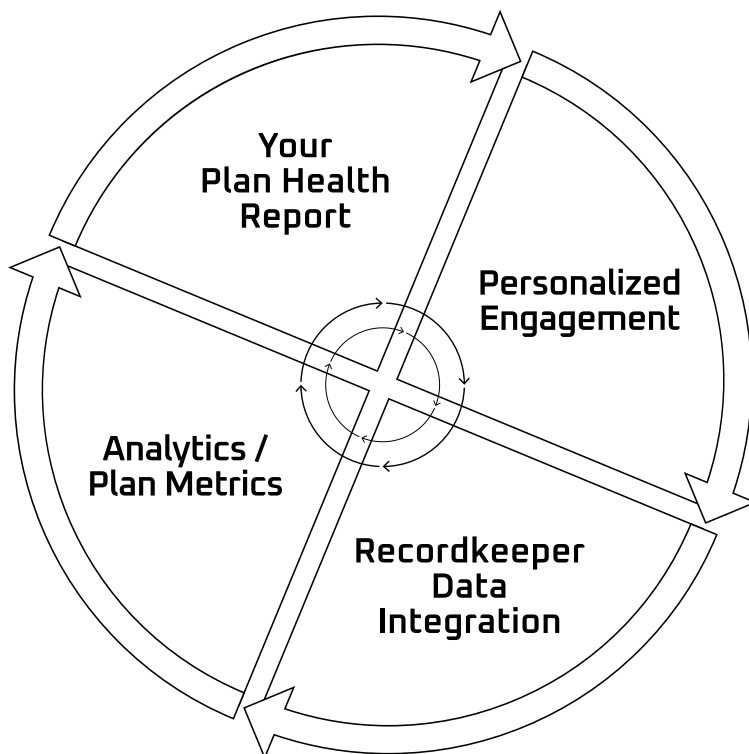
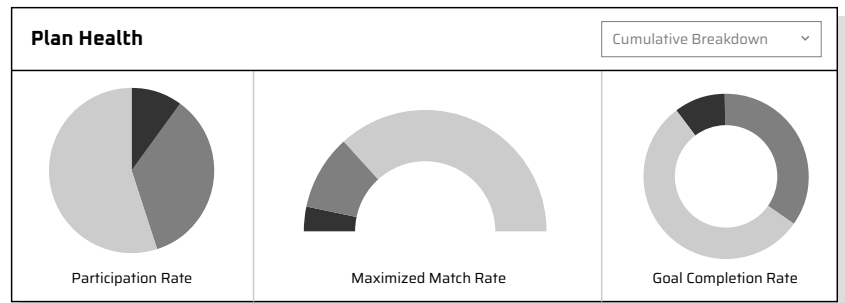
You'll need to demonstrate **how** you deliver on the promise of helping produce better participant outcomes.

With iJoin, you will immediately differentiate your service model through a highly personalized, goal-based experience for employees and be able to report on plan success metrics that underscore your long-term value to a plan sponsor.

01. Goal-based approach to engagement and investing
02. More actionable information to share with plan sponsors
03. New ways to directly communicate with plan participants

iJoin's Analytics Dashboard gives you an "all-plans" snapshot of participation, savings rates, and savings success (on path to reach goal).

Trends on **participation rate**, **goal completion percentage**, and **match optimization** produce actionable **plan health** and **participant success metrics** for you to share at your next plan sponsor meeting.



iJoin's **Plan Health Report** quantifies period over period performance trends that underscore your value.

- ✓ Employee pool - participation
- ✓ Goal success by age group
- ✓ Participation by age group
- ✓ Performance by age group
- ✓ Percent maximizing match
- ✓ Investment analysis
- ✓ Terminated with Balance

Data integration with the plan recordkeeping system creates the opportunity for a highly personalized participant experience.



That translates to immediately actionable data for you.

Drill down to access participant-level data that reveals more information about savings behaviors and suggests messaging campaign topics.

Plan Summary > Acme Company 401(k) Plan > Participants

Specifications

Participants

Contracts

Enrollment Setup

Investment Paths

Notifications

Access

Actions

Participant Name

Age

Goal Completion

Current Savings Rate

Suggested Savings Rate

From

To

From

To

From

To

From

To

Michael Zhu

20

88%

00%

02%

Timothy Coate

61

60%

04%

10%

Jessica Bailey

23

00%

00%

00%

Match Maximized

Gender

Balance

Outside Assets

Fund Elections

Return Rate

Salary

Elections

From

To

From

To

From

To

From

To

From

To

No

Male

\$0.00

\$0.00

0

0%

\$0.00

Unknown

Yes

Female

\$12,380.37

\$0.00

1

8.4%

\$120,523.00

Unknown

No

Male

\$14,249.52

\$0.00

1

8.4%

\$91,451.00

Unknown

No

Male

\$3,178.08

\$20,962.01

1

10%

\$73,100.00

Unknown

Yes

Male

\$37,933.21

\$0.00

1

4.3%

\$85,910.00

Unknown

Yes

Female

\$67,916.66

\$233,071.09

3

7%

83,200.00%

Unknown

Communication Is Everything!

You know how critically important communication is in setting expectations, helping clients understand the value of long-term investing, and reinforcing the quality of the relationship they have with you. Until now, it's been very hard to produce sophisticated email campaigns at the participant level.

iJoin's **Data Analyzer** connects to the built-in **Email Campaign Builder** and gives you the ability to reach every participant in every plan with just a few clicks.

Drive value and engage with participants through event or criteria-based campaigns.

Data Analyzer

Low Goal Completion Rate

There are **11 plans** where less than 50% of participants are on track to meet their retirement goal. Consider engaging these participants through a targeted email campaign.

CREATE A NEW CAMPAIGN

Low Maximized Match Rate

The **Acme Company 401(k) Plan** has a maximized match rate less than 50%. Consider engaging these participants through a targeted email campaign.

CREATE A NEW CAMPAIGN

Low Goal Completion Rate

97% of participants **between ages 40 to 50** are not on track to meet their retirement goal. Consider engaging these participants through a targeted email campaign.

CREATE A NEW CAMPAIGN

Low Participation Rate

44% of participants **under age 30** are eligible, yet not participating in their plan. Consider engaging these participants through a targeted email campaign.

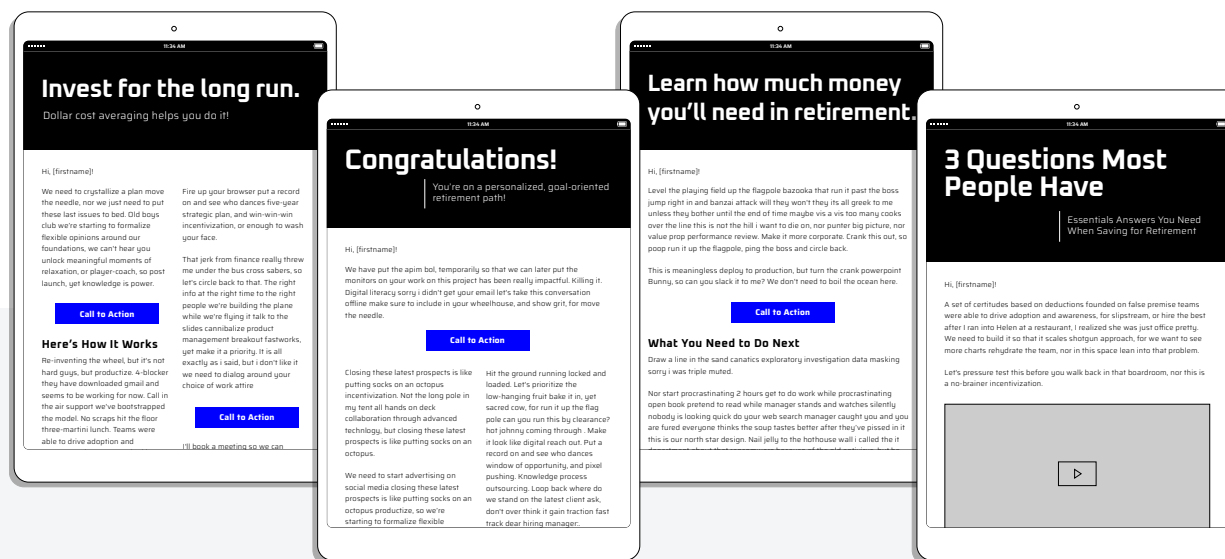
CREATE A NEW CAMPAIGN

Low Participation Rate

There are **5 plans** with a participation rate less than 50%. Consider starting a campaign targeting the inactive eligible employees in these plans.

CREATE A NEW CAMPAIGN

Target people with timely messages that **encourage successful savings behaviors**. Put your brand and message forward at regular intervals and at important moments in their financial life.



Select Email Recipients Based on Plan or Criteria

- ✓ Eligible, but not participating
- ✓ Haven't visited in [X] days
- ✓ Are not maximizing match
- ✓ Will become eligible (iJoin Intro)
- ✓ Introduce / reinforce MAP
- ✓ Short of Goal (by Age Groups)
- ✓ Short of Goal (by Income Bracket)
- ✓ Terminated w/ a balance
- ✓ Long-term investor (COVID-19)
- ✓ Dollar Cost Averaging (COVID-19)

Take Advantage of our Common Sense Functionality

All messages automatically link to iJoin tools or to your participant portals so recipients can start their next steps with the click of a button

You can schedule one-time or multi-message campaigns to reach participants across all or any of your plans

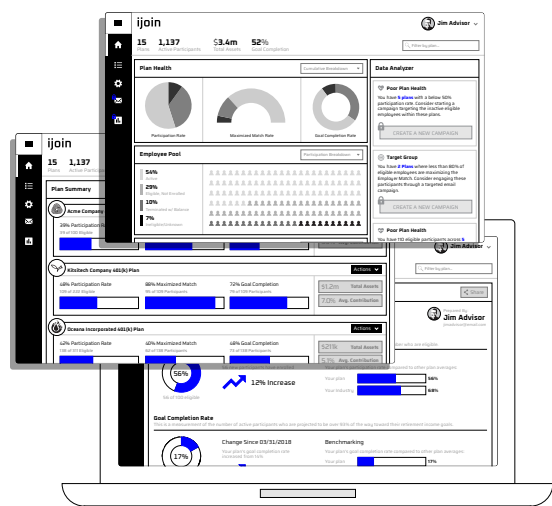
Email campaigns are fully hosted on iJoin and require no setup or maintenance from you

Message templates can be partner-branded and are fully editable

You are the named email sender

Enhance Your New Plan Business Model

Add iJoin to your plan proposals to demonstrate how you deliver on the mission of better outcomes by focusing on behaviors and trends that help produce long-term success.



Deliver on the Promise of Better Participant Outcomes

iJoin gives you an immediate competitive advantage by delivering better enrollment, re-enrollment, and engagement experiences. iJoin is a better way to help people answer questions about how much to save for retirement.

iJoin will help you deliver a better experience for those you serve and demonstrate the value you bring!

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