

# Company Overview

iJoin is a leading innovator in retirement plan technologies, offering unparalleled participant and advisor tools. Our data-driven, goal-based user experiences are integrated with leading managed accounts, in-plan guaranteed income, and IRA rollover providers to provide the retirement ecosystem with personalized solutions for success.

## Products Driving Innovation

**ENROLL** presents a branded, highly-personalized, goals-based enrollment or re-enrollment experience with built-in education, advice, and engagement tools.

**MAP MARKETPLACE** seamlessly integrates traditional and advisor managed account program offerings from leading providers.

**INCOME MARKETPLACE** provides streamlined access to a growing array of in-plan income solutions integrated with managed account and TDF investments.

**ACT ANALYTICS/REPORTING** underscores your value with unparalleled plan health and participant success metrics and data-driven insights.

**ACT ENGAGEMENT/COMMUNICATIONS** targets every employee at the right time with customizable, rules-based messaging campaigns.

**EXPLORE** improves retirement readiness with personalized, financial planning and education based on each user's unique needs and path.

**IRA ROLLOVERS** streamline workflows with fully automated voluntary and force-out rollover solutions

## iJoin-at-a-Glance

Partnering with 40+ retirement recordkeepers

Supporting 3M+ active participants

Team with 100+ years of experience in the retirement and financial services industries coming from AIG, Fidelity Investments, FIS, Franklin Templeton, TIAA, and Vestwell

Founded in 2017

Reinvested in core technology and relaunched in 2019

Business Process Outsourcing (BPO) // Next Generation solutions partner to FIS

### Managed Account Partners



### In-Plan Guaranteed Income Partners



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