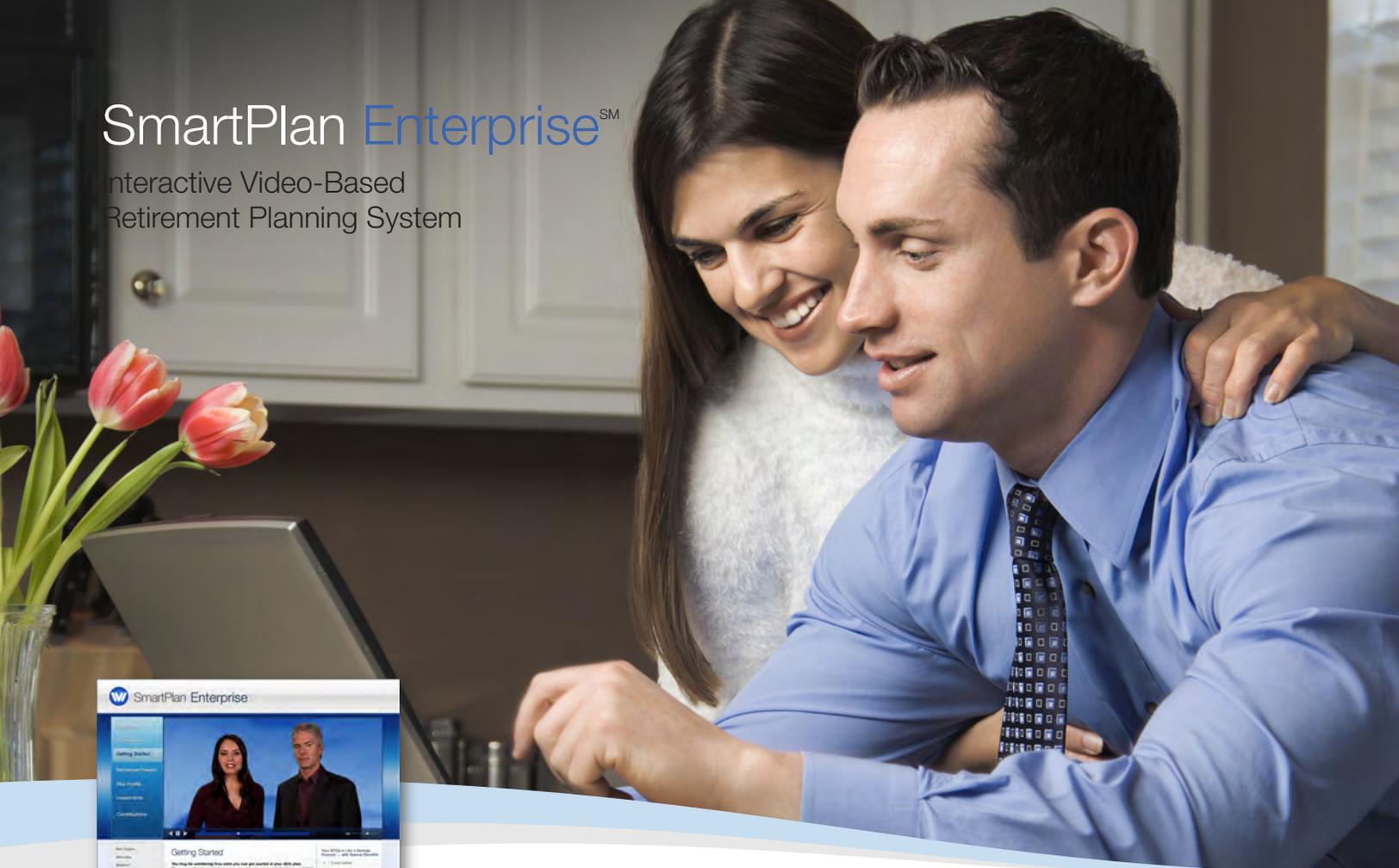


SmartPlan EnterpriseSM

Interactive Video-Based
Retirement Planning System



Key Benefits of SmartPlan:

- Higher enrollment
- Increased contribution levels
- Fewer on-site live meetings
- Improved financial education
- Reduced support costs
- Personalized advice (optional)
- Fulfillment of fiduciary duty, with analytics and tracking of user visits and actions

Educate. Entertain. Engage.

Introducing SmartPlan Enterprise, a revolutionary interactive, video-based system proven to increase plan participation and help to fulfill fiduciary duty, while reducing the need for print communications and on-site meetings.

SmartPlan is designed to educate, entertain and engage employees. Video hosts discuss plan features and the benefits of participation, and then guide users through an interactive process that helps them discover their individual retirement needs and risk profile, as well as choose plan investments and contribution amounts. And with the personalized advice option, participants can get the help of investment professionals to create an investment selection tailored to their individual needs. Best of all, SmartPlan Enterprise is integrated with the provider database, facilitating automated enrollment and updates.

SmartPlan is fully customizable. Brand it with a provider or sponsor logo, and choose which plan provisions our hosts will discuss, such as auto-enrollment, loans, and matching contributions. A comprehensive user administration portal makes it easy to create and manage an unlimited number of custom versions.



SmartPlan EnterpriseSM

Interactive Video-Based Retirement Planning System

Key Features of SmartPlan:

- Video hosts discuss specific plan features and benefits in brief segments with Hollywood-quality production value
- Interactive applications capture participant choices for retirement needs, risk profile, plan investments and contributions
- Personalized advice availability gives participants access to investment professionals
- Integrated with the provider database for personalized user experience, pre-populated investments, automated enrollment and updates
- Customizable: add independent recordkeeper and/or sponsor company logo, and choose which plan provisions hosts will discuss
- Comprehensive user administration portal: create and manage an unlimited number of custom plans
- Automated email outreach and vHost video ads
- User tracking and analytics, and individual participant profiles
- Hosted application, for 24/7/365 availability

Powerful Outreach, in a Customizable User-Friendly Format

Designed to help employees better understand their 401(k) and 403(b) plans, SmartPlan provides the benefits of a financial professional, without the expense typically associated with live meetings.



SmartPlan Enterprise combines an easy-to-use interactive video-based interface with a comprehensive set of promotional tools — including automated email and vHost video ads, user tracking and analytics, as well as links to the provider database — to create a powerful new way to educate and engage employees.

When launched in a web browser, SmartPlan Enterprise looks and sounds just like a TV show. Our video hosts offer a brief overview of plan basics, followed by a discussion of selected features — such as auto-enrollment, matching contributions, loans — that you can customize for each sponsor's plan.

Using simple interactive forms, our hosts then guide participants through a complete process, including individual retirement needs and risk profile surveys, and selection of investments and contribution amounts, that generates a personalized investor profile. For participants who want some help choosing investments, professional financial advice is available as an option. And because SmartPlan Enterprise is integrated, each participant's profile is updated in the provider database automatically.

Effective. Efficient. Smart

The SmartPlan Enterprise system is a hosted solution, designed to incorporate seamlessly into your outreach program for just pennies per participant per month. Visit vwise.com or call us today to learn how you can be more effective, efficient, and smart, with SmartPlan.



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