

# SmartPlan Enterprise<sup>SM</sup>

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
- Fulfillment of fiduciary duty, with analytics and tracking of user visits and actions



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## Educate. Entertain. Engage.

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

- Video hosts discuss specific plan features and benefits in brief segments with HDTV-quality production value
- Interactive applications capture participant choices for retirement needs, risk profile, plan investments and contributions
- Integrated with provider database for personalized user experience, automated enrollment and updates
- Customizable: add provider 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