

## Uncover the Potential of Corporate Retirement Plans



Retirement PlanView™ by Infinata is a unique cloud-based analytics and intelligence solution which helps service providers improve business development with actionable insight into corporate retirement plans.

- **Opportunity Reports** - Receive daily notifications of plans meeting your ideal custom criteria for lead targeting
- **Benchmarking** - Analyze comparisons of fund performance, service fees and more to displace your competition
- **Decision-making Contacts** - Meet the plan administrators, actuaries, insurance providers and recordkeepers guiding key plans

## Analyze Your Opportunity to Become a Trusted Partner

Retirement PlanView provides an exclusive layer of analytics atop reliable 5500 filing data which enable you to identify and take action on competitive opportunities.

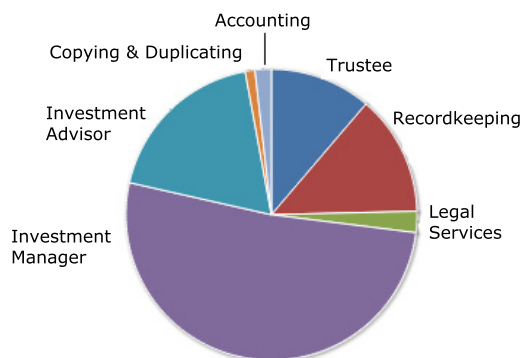
Our system creates an individual profile for every plan featuring performance and fee benchmarks compared to market standards as well as a customized peer group of similar plans. You can also run benchmark reports against custom segments important to you. This unprecedented level of analytics opens exciting opportunities for you to:

- Increase assets and ROI for poorly managed plans
- Reduce fees for plans paying too much for services
- Identify similar plans receiving inferior service and investment results from your competitors

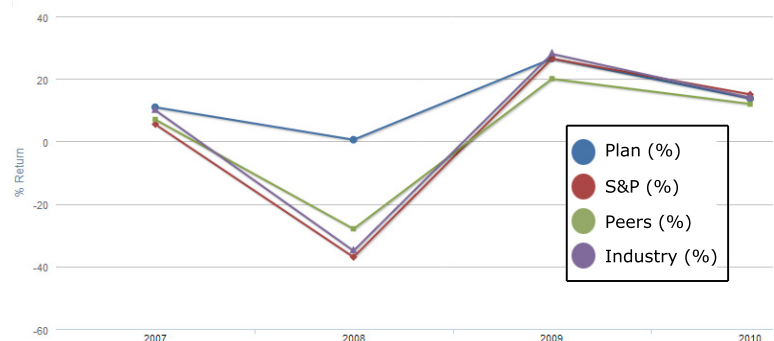
By analyzing performance and fee benchmarks for each plan, we enable you to exceed your clients' expectations.

Plan Type	Net Assets	State	Filing Year	Total Fees (\$)	Fee % Rating*	Inv. Performance	Performance Rating*
Defined Contribution	751,535	MA	2010	9,371	High	13.11%	Poor 1
Welfare Benefit Plan	7,550,821	MA	2010	470,066	Average	11.5%	Poor 1
Defined Contribution	7,700,976	CT	2010	64,238	Excessive 1	32.89%	Poor 1
Defined Contribution	1,889,514	RI	2010	5,034	High	12.89%	Poor 1
Defined Contribution	3,311,710	MA	2010	45,103	Excessive 1	14.62%	Poor 1
Defined Benefit	43,364,334	MA	2010	312,008	High	16.08%	Poor 1
Defined Contribution	3,258,358	MA	2010	1,475	Low	12.86%	Poor 1
Welfare Benefit Plan	475,407,887	Intl	2010	901,534	Low	11.29%	Poor 1
Defined Benefit	3,479,069	CT	2010	1,942	Low	14.24%	Poor 1
Defined Contribution	6,139,058	CT	2010	8,485	Average	18.2%	Poor 1

### Fee Distribution by Service Group



### Historical Performance vs. Benchmarks



# Retirement Reporting

Use best practices to understand markets, prospects, opportunities and competitors with reports including:

Featured Analytics	Description
<b>Fee Analysis</b>	High-level breakouts by geography, industry and provider type
<b>Fee Trend Analysis</b>	Fees paid over time by service type, plan type and sponsor industry
<b>Service Provider Profiles</b>	Description of service providers receiving the highest fees across service groups
<b>Benchmark Reports</b>	Intuitive visual rating system to easily identify plans in need of improvement
<b>Opportunity Reports</b>	The best opportunities for your custom requirements delivered automatically
<b>Peer Group Analysis</b>	Comparative analysis of plan sponsor fees and assets vs. relevant peers
<b>Recordkeeper Review</b>	A deep dive into high-level and individual plan relationships with recordkeepers
<b>Plan Trend Report</b>	Key retirement plan data trended over time and broken out by various metrics

## Putting 5500 Filings to Work

Retirement PlanView unlocks the hidden value of corporate 5500 filings by consolidating information into one intuitive online interface with daily alerts and precise searches - on plans, plan sponsors, investment providers, insurance carriers, service providers, actuaries and more - using dozens of specific filters including:

- Type of plan (DB, DC, welfare...)
- Average balance per participant
- Plan sponsor details
- Age of plan
- Total assets
- Asset growth rate
- Investment performance
- Month of plan renewal
- Active participant number/rate
- Total contributions
- Performance benchmarks
- Plan classification

## The Profile of a Plan

We develop a detailed and actionable profile page for each individual plan, enabling you to take full advantage of the information, analytics, key contacts and service providers associated with it. Sample profile:

**ACME CORPORATION 401(K) PLAN**

Standard Benchmark Report

Custom Benchmark Report

Track

Form 5500 Attachments

**Plan Sponsor: ACME CORPORATION**

Sponsor EIN: 012345678

Plan Number: 001

Plan Type: Defined Contribution

Plan Year Beginning: 2010-01-01

Plan Year End: 2010-12-31

Plan Effective Date: 2001-01-01

Plan Classification: Single-Employer Plan

Collectively-Bargained Plan: No

**Sponsor Address**

500 Rutherford Ave.  
Albuquerque, NM

**Plan Ratings**

This plan's fees are **Low**

This plan's performance is **Poor**

**Plan Administrator**

Name: ACME CORPORATION

Signed Name: W.E. Coyote

EIN: 012345678

Phone: 555.555.1234

**Participant Information**

Total Participants (BOY) 211

Total Participants (EOY) 212

Active Participants 155

Active Participation Rate 93.55%

Participants with Account Balance 202

Retired Partic. Receiving Benefits -

Retired Partic. Entitled to Future Benefits 57

Recipients Terminated & Not Fully Vested -

Total Contributing Employees -

**Plan Benefit Arrangement**

Insurance: No

Sector 412(e)(3) contact: No

Trust: Yes

General assets of sponsor: No

**Plan Funding Arrangement**

Insurance: No

Sector 412(e)(3) contact: No

Trust: Yes

General assets of sponsor: No

**Pension Benefit Features**

Code Description

2E Profit-sharing

2F ERISA section 404(c) plan

2G Total participant-directed account plan

2J Code section 401(k) feature


2K Employer Matching Component

2T Qualified Default Investment Account (QDIA)

3D Pre-approved pension plan

## Discover the Opportunities You are Missing

Receive a complimentary personalized online demonstration at [www.infinata.com/planview](http://www.infinata.com/planview).

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