

SmartPlan™

Interactive Web-Based Video Software



Key Benefits of SmartPlan:

- Differentiate your business
- Educate and enroll participants
- Higher enrollment
- Increased contribution levels
- Reach more participants in multiple locations
- Marketing tools
- Analytics for data mining
- Fulfill some plan sponsor fiduciary responsibilities through quantifiable data

Engage. Educate. Enroll.

Introducing SmartPlan. This revolutionary interactive web-based video software is proven to increase retirement plan participation, helping to fulfill some fiduciary responsibilities while reducing the need for print communications and on-site meetings.

SmartPlan is designed to engage, educate, and enroll 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. SmartPlan is fully customizable to your plan and easy to use.