

**> Find 401(k) plans ready for a change and win the business with field-tested prospecting strategies and market data for retirement plan sales professionals.**



**OVERVIEW:**

Retirement Plan Prospector+ provides sophisticated defined contribution and defined benefits sales prospecting and plan analysis tools to drive your sales.



- Plan Score Card, Red Flags, Performance-Based Benchmarking and other strategic resources
- Every form 5500, available immediately after the DOL releases it
- CRM-friendly export



- Graphic-rich Report Builder
- 500+ search fields in an intuitive filtering tool

**What is Retirement Plan Prospector+?**

Retirement Plan Prospector+ is an intuitive and comprehensive online sales prospecting and plan analysis tool, providing insights into the 401(k) and pension markets. Prospector+ enables you to find qualified leads that are similar to your best customers, identify potential new market opportunities and win the business.

Prospector+ takes the lessons learned from our most successful clients and delivers them directly to you. Subscriptions are available for individual states, regions or national access. Prices vary based on geographic area and number of users.

**Connect with one of our knowledgeable reps today.**

Call 800-231-0669, option 1 | Email [sales@judydiamond.com](mailto:sales@judydiamond.com)  
Visit [www.judydiamond.com/retirementplanprospector](http://www.judydiamond.com/retirementplanprospector)

# What does the Retirement Plan Prospector+ include?

- Current and historical form 5500 disclosure filings collected directly from the Department of Labor
- More than 500 different searchable fields in the simplest, most intuitive search tool in the industry
- Exclusive plan analysis tools to help you find the most qualified leads, including:
  - o **Red Flags:** Indicate possible problems in a plan's design or evolving needs
  - o **Plan Scores:** Summarizes a plan's value as a prospect in a single score out of 100, allowing comparison of an individual plan against all other plans in the same state, same industry, with a similar asset level
  - o **Performance-Based Benchmarking:** Use existing clients as peer group, and show potential clients what they could be achieving
  - o **Dynamic Sales Talking Points and Marketing Letters** on plan issues
  - o **Plan Analysis** calculating metrics for your entire search results in real time
- Unique contact information, including names, email addresses and titles of up to three plan decision-makers (HR directors, benefits managers, CFOs)
- Graphic-rich Report Builder allows you to customize presentation-ready plan reports. Be prepared for your next client meeting in seconds.
- CRM-friendly Export means that any of our plan data can be uploaded into your other databases smoothly.

The image displays three overlapping screenshots of the Retirement Plan Prospector+ software interface, each labeled with its respective function:

- Report Builder:** Shows the 'Generate Report' screen with a sidebar menu (ACTUARY INFORMATION, SPONSOR SUMMARY, BENCHMARK, MARKETING LETTERS, PLAN REPORT, RECENTLY VIEWED PLANS) and a main area titled 'Build a Presentation-Ready Report'. It lists various report components like Contact Information, Plan Type Features, Plan Financials, Plan Providers, Red Flags, Plan Scorecard, Actuary Information, Sponsor's Other Plans, Plan Participants, and Talking Points. A preview of a report for '02 PARTNERS LLC' is shown below.
- Benchmark:** Shows the 'Benchmark' screen where a peer group is selected. It displays a table comparing metrics for '02 PARTNERS LLC' against a peer group of 1,512 plans. The table includes columns for Metric, Plan Value, Peer Group Value, and Difference. Below the table is a 'Participant Rate' bell curve chart.
- Plan Scorecard:** Shows the 'Plan Scorecard' screen for '02 PARTNERS LLC'. It features a large 'NATIONAL PLAN SCORE' of 26 and a 'Plan Score Barometer' comparing the plan's score to State Average (59), Industry Average (58), Average of Plans with Similar Asset Size (57), and Average of Plans with Similar Participant Size (53). A table at the bottom shows metrics like Rate of Return, Actual Value, and Rank out of 100.



### **Request a Free Trial**

Find out if the Retirement Plan Prospector+ is the right solution for your team's lead generation and plan analysis needs.

**Visit** [www.judydiamond.com/retirementplanprospector](http://www.judydiamond.com/retirementplanprospector)

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