

Why PATHFINDER?

PATHFINDER is the leading unbiased corporate retirement plan search platform used by broker/dealers, registered investment advisers, asset managers/DCIO, and individual advisers. With Pathfinder, advisers can conduct plan provider due diligence review projects and implement a more efficient and comprehensive management of the request for proposal (RFP) process.

PATHFINDER REPORT			
Question	ABC Sample Provider	MNO Sample Provider	QRS Sample Provider
Required			
Total plan asset size range	\$1 - \$9,999,999	\$1 - \$50,000,000	\$1 - \$50,000,000
Bundled or Unbundled	Bundled	Can be either Bundled or Unbundled	Bundled
Participants with account balances	1 - 999,999,999	1 - 9,999,999	1 - 999,999,999
Self-Directed Brokerage Account SDBA	✓	✓	✓
Custom Document - Administration	✓	✓	✓
Preferred			
Termination kit available	✓	✓	✓
Online GAP analysis / retirement calculator tool	✓	✓	✓
Spanish materials available	✓	✓	✓
Spanish language on IVR and website	Internet	Internet	Internet IVR
Automatic enrollment	✓	✓	✓
Enrollment eligibility determined by Provider	⊗	✓	✓
Company Stock investment option available in product	⊗	✓	✓
Employee meetings in Spanish	⊗	⊗	✓
Company Stock - Publicly traded available in product	⊗	✓	✓
Call center representatives who speak Spanish	✓	✓	✓

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The following are the top five ways PATHFINDER can help:

- 1. Comprehensive.** Utilize the industry's most comprehensive service provider database and customized responses for investment mapping and plan costs.
- 2. Efficient.** Streamline the search and benchmarking process and eliminate manual, time consuming, and outdated provider spreadsheets.
- 3. Independent.** Assist clients in managing their fiduciary responsibilities by using independent third party data and documenting the search process and provider selection.
- 4. Customizable.** Create provider comparison output reports specific to the adviser and each plan sponsor client or prospect.
- 5. Compliant.** Assist with compliance department oversight of outputs and proposals presented to plan sponsors by including firm level disclosures and e-mail notification of fee quotes.

Want to save time, streamline, and get access to the power of PATHFINDER?

Contact a member of our sales team for more information:

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