Advisor IQ™ Business Intelligence Dashboards

A Dynamic Dashboard for Retirement Plan Advisors

With the ever-changing landscape of the retirement plan industry, having clear insight is critical to profitability and growth of an advisors business. Advisor IQ helps advisors identify gaps, reveal opportunities and make better business decisions. Advisor IQ™ is a suite of revolutionary data aggregation and business intelligence dashboards for advisors and their firms. The dynamic dashboards give advisors holistic data visualizations, allowing them to drill-down into their client, plan, asset, and investment data, helping to produce actionable insights.

The Advisor IQ™ dashboards aggregate retirement plan and asset data for every client under a firm's purview, giving advisors compliance and data oversight of their entire book of business. Additionally, the dashboards give advisors a powerful practice management platform that helps increase sales and firm-wide profitability.

Insights into the assets under management, provider usage, fund monitoring, plan-level services and fiduciary actions.

The dynamic dashboards include:

- Assets Under Management
- Clients & Plans
- Firm Revenue
- Fund Utilization
- Play Types
- Provider Usage
- Plan Level Services
- Client Deliverables
- And more!

Advisor IQ works in conjunction with RPAG's data integration service, Plan Asset Link (PAL), to gather plan-level data from over 100 service providers, as well as RPAG's entire suite of investment, fee benchmarking, target date suitability, stable value comparison, plan design, provider analysis and client management systems.

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