

Accurate. Instant. Customized.

Welcome to a better way to benchmark retirement plan fees

THE PROBLEM

When it comes to delivering an annual fee benchmarking report or a quick conversation starter, most simple benchmarking reports are either inaccurate or take too long to produce. Advisors are often left scrambling to provide clients with a meaningful and accurate fee benchmarking.

THE SOLUTION

PlanFees fills that gap by giving advisors an accurate, instant and customized process that combines the functionality of an easy benchmarking tool with the data from the industry's leading live-bid proposal system.



Using only verified data from live-bid pricing proposals from the industry's leading service providers, our Prism™ benchmark universe provides an accurate and realistic fee benchmark. We take our massive database and give you a streamlined experience so you can create reports with just a few clicks and spend more time with your customers.



Verified and accurate retirement plan pricing data



Efficient data integration through SSO and OCR



Customize benchmarks on the fly



Deliver visually engaging reports via mobile app

ABOUT PLANFEES

Our mission is to bring retirement plan fee transparency and clarity to plan sponsors. By only integrating with the highest quality partners and utilizing cutting-edge technology, such as optical character recognition, we provide unparalleled accuracy in our data. The seamless web portal and mobile experience allows retirement plan advisors and their clients to make better business decisions and reveal areas of fiduciary concern.