ADVISOR PORTAL GUIDE

DASHBOARD WALKTHROUGH

ADVISOR.401K.COM

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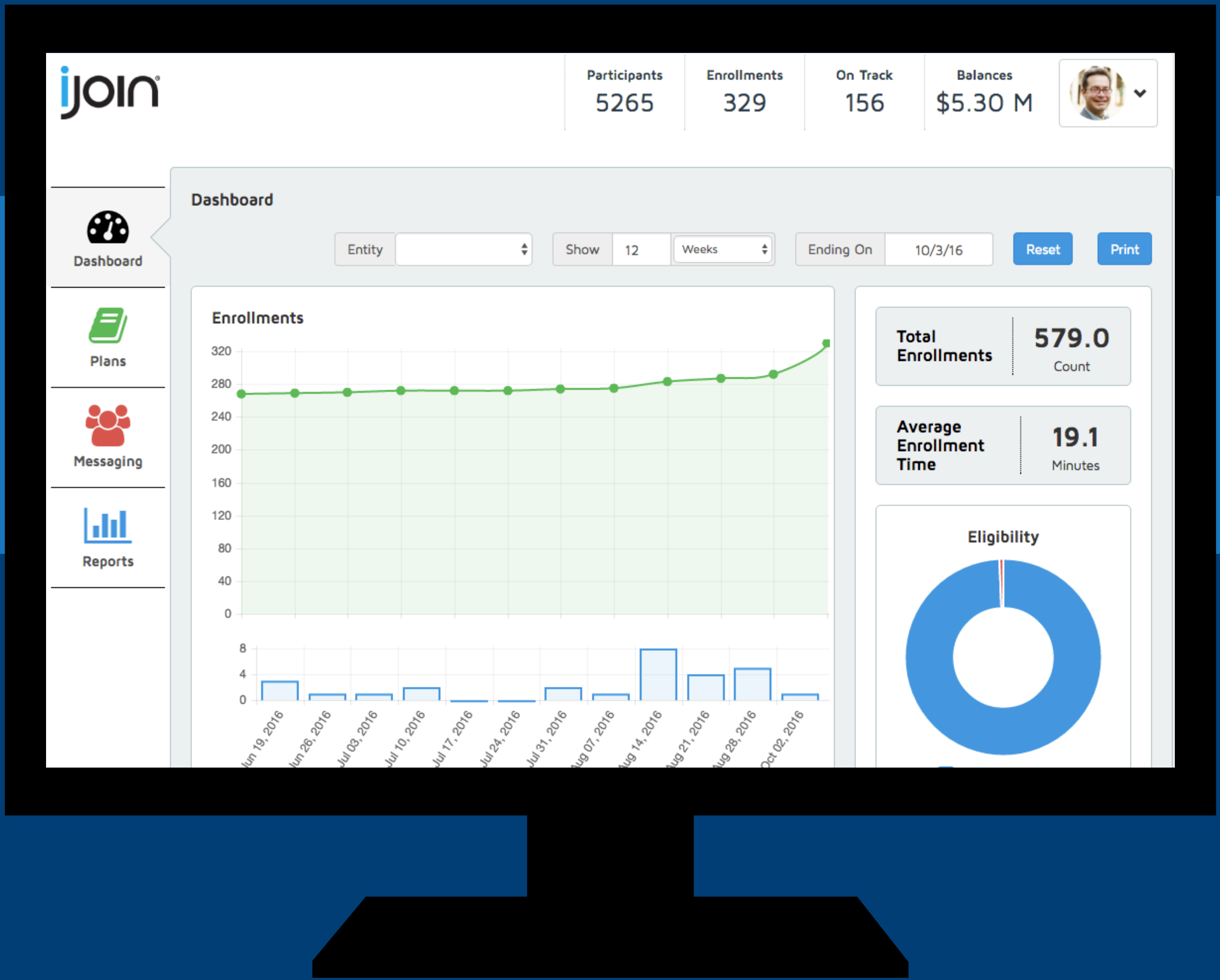
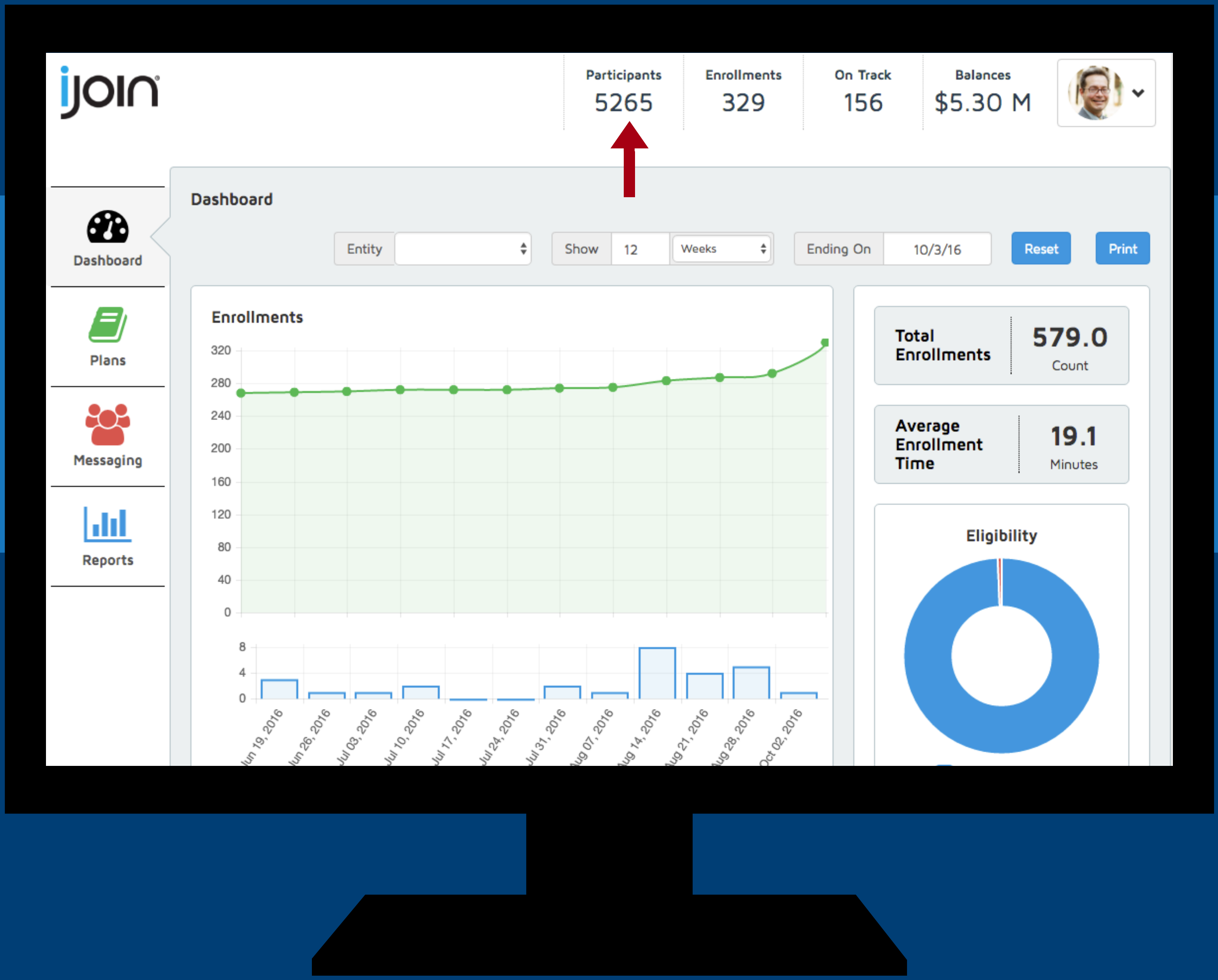
YOUR DASHBOARD



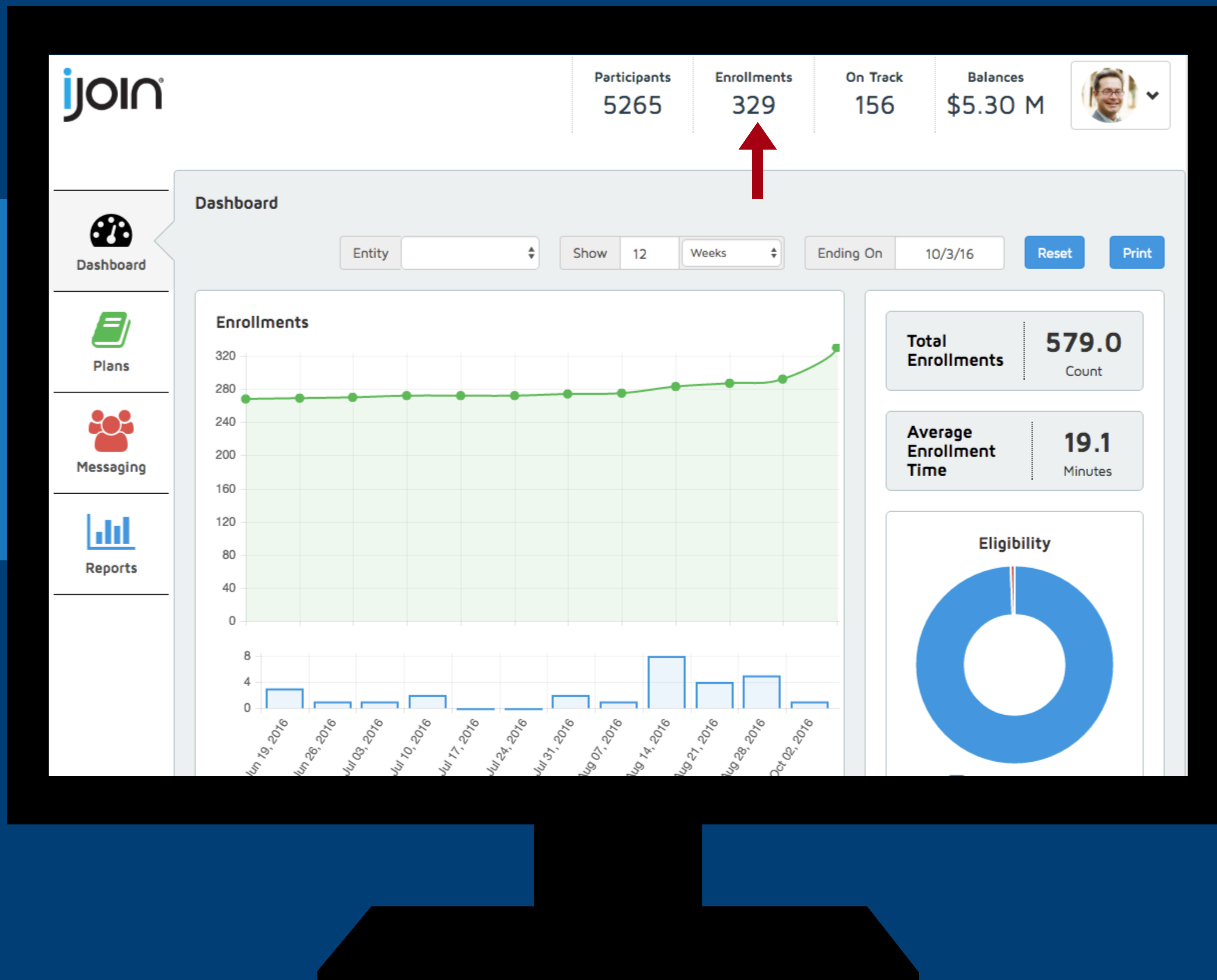
The Dashboard helps you understand participant data through charts + graphs.

PARTICIPANTS



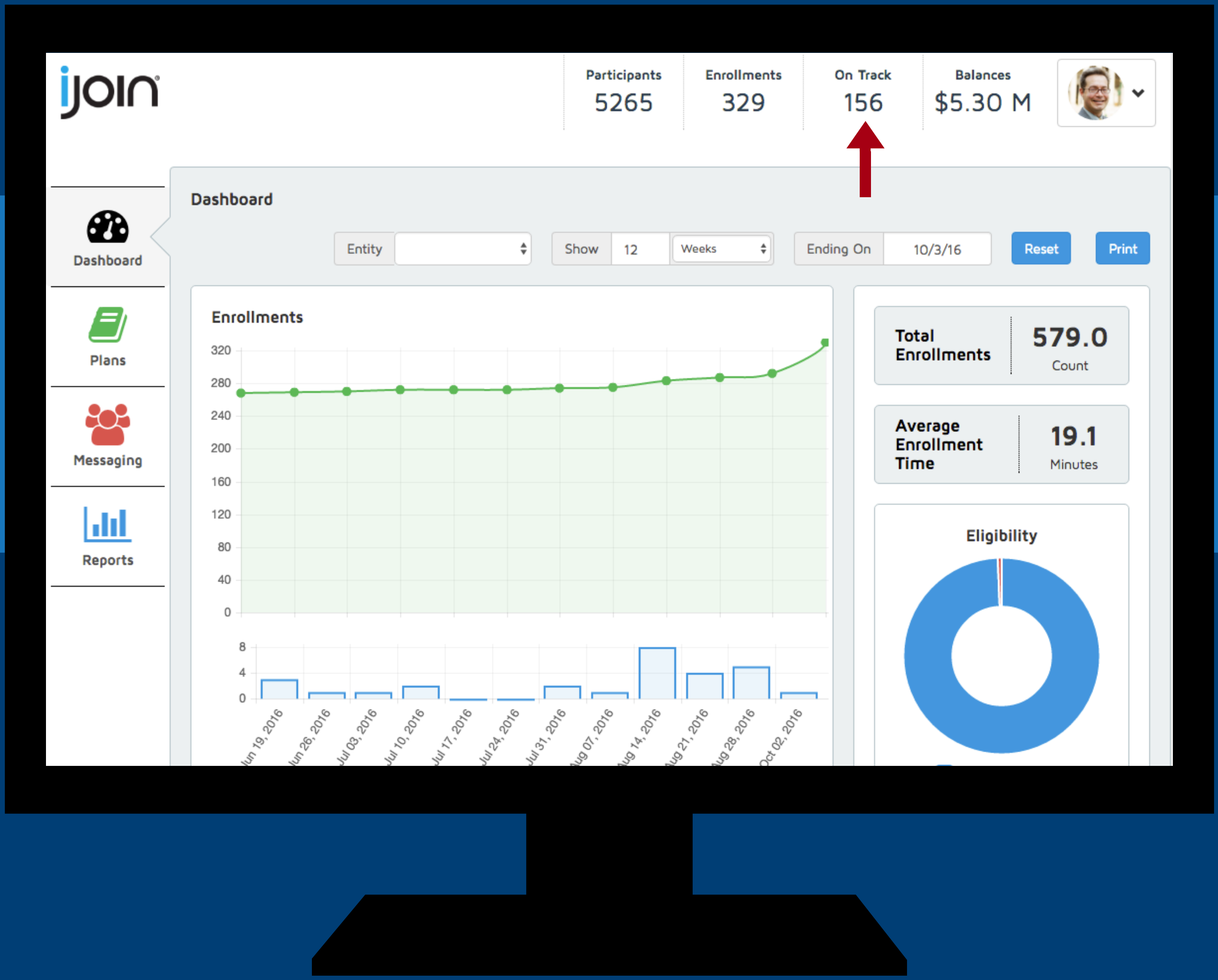
The number of unique + eligible participants across all revisions of the plan.

ENROLLMENTS



The number of unique enrollments across all revisions of a plan. Participants who enroll multiple times are counted as a single enrollment.

ON TRACK



The number of enrolled participants who are on-track with the plan's retirement goals.

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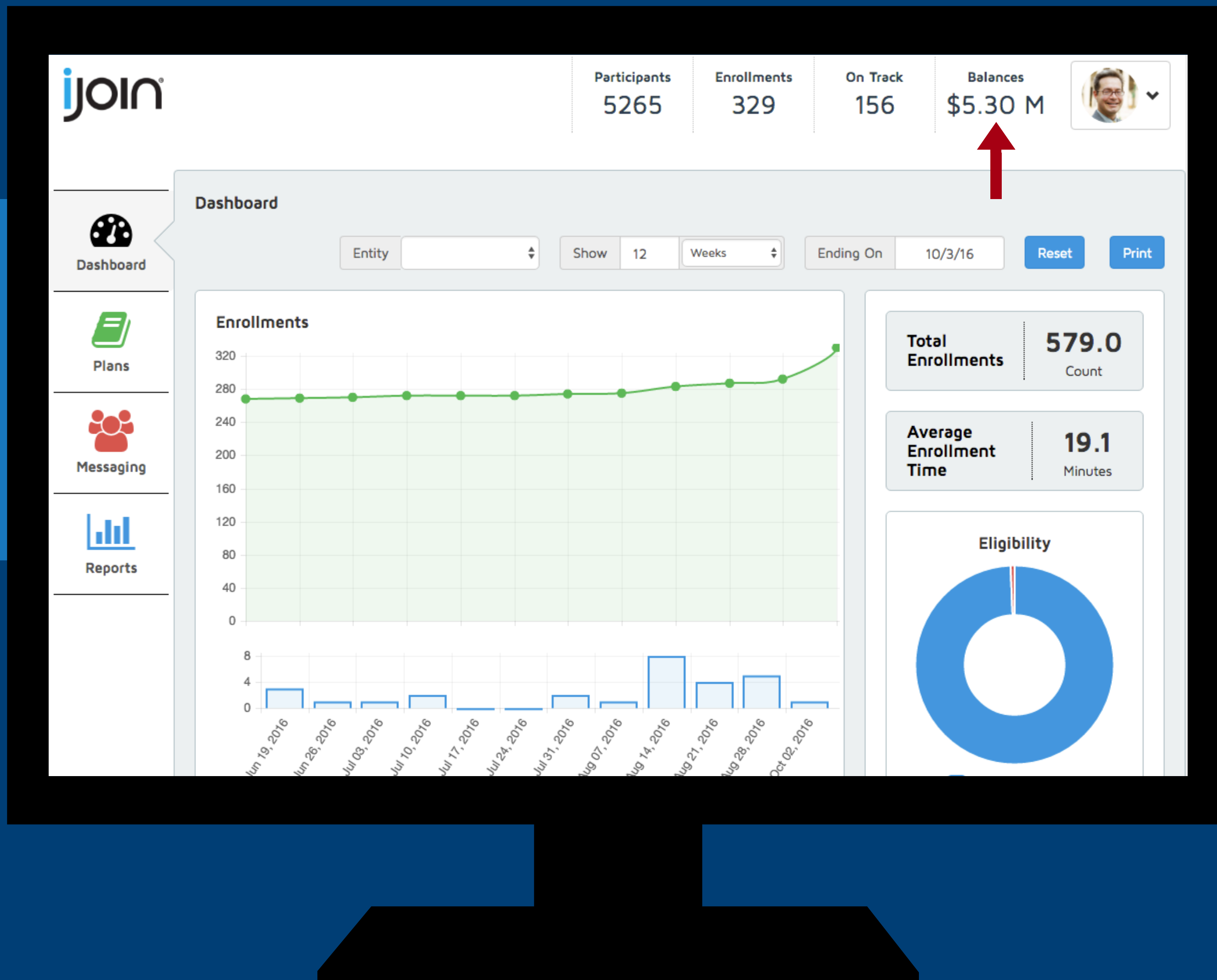
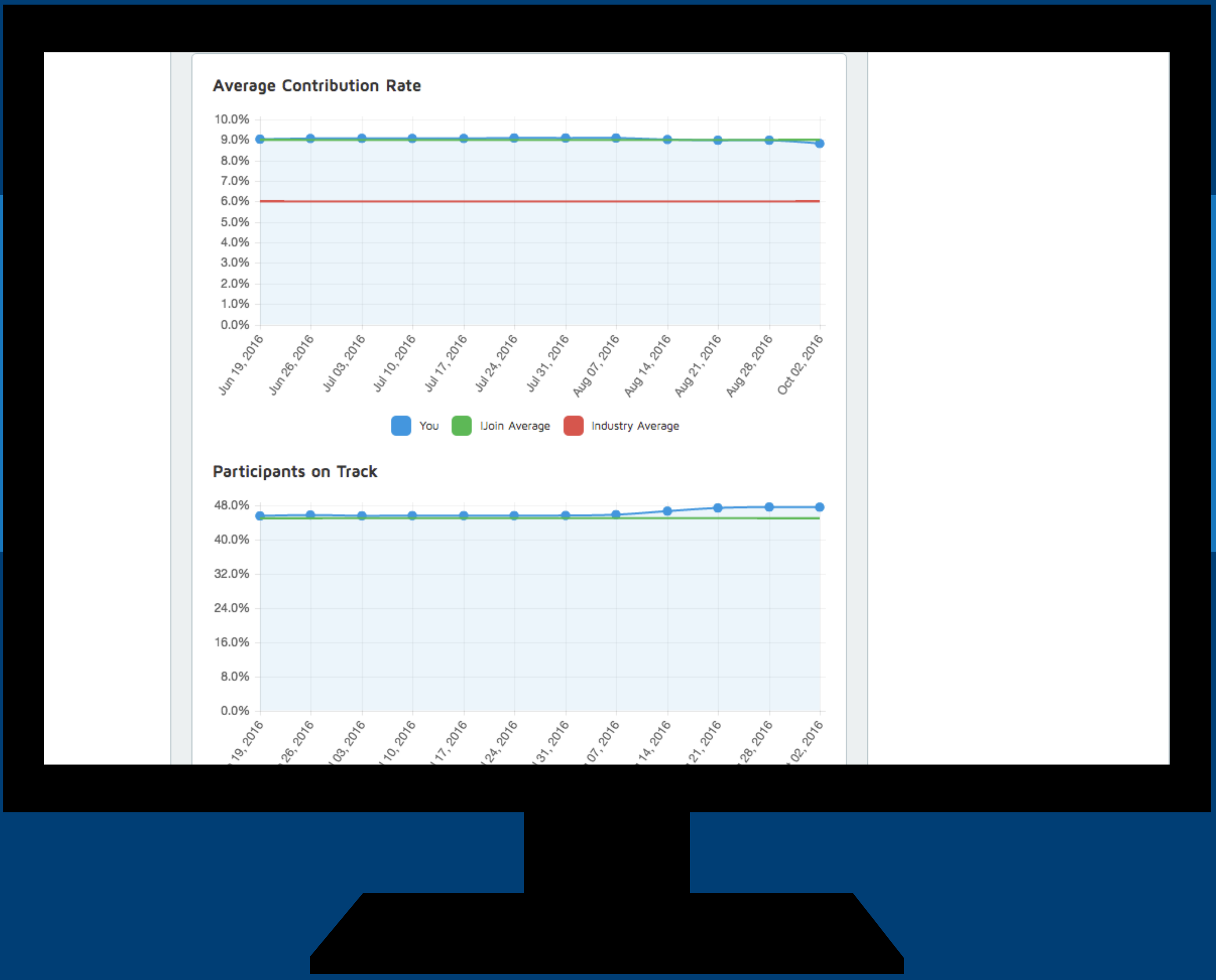
BALANCES



The sum of the most current known balance for each participant.

PERFORMANCE GRAPHS



Average Contribution Rate over Time , Participants on Track over Time, Balances + Rollover Eligible plans

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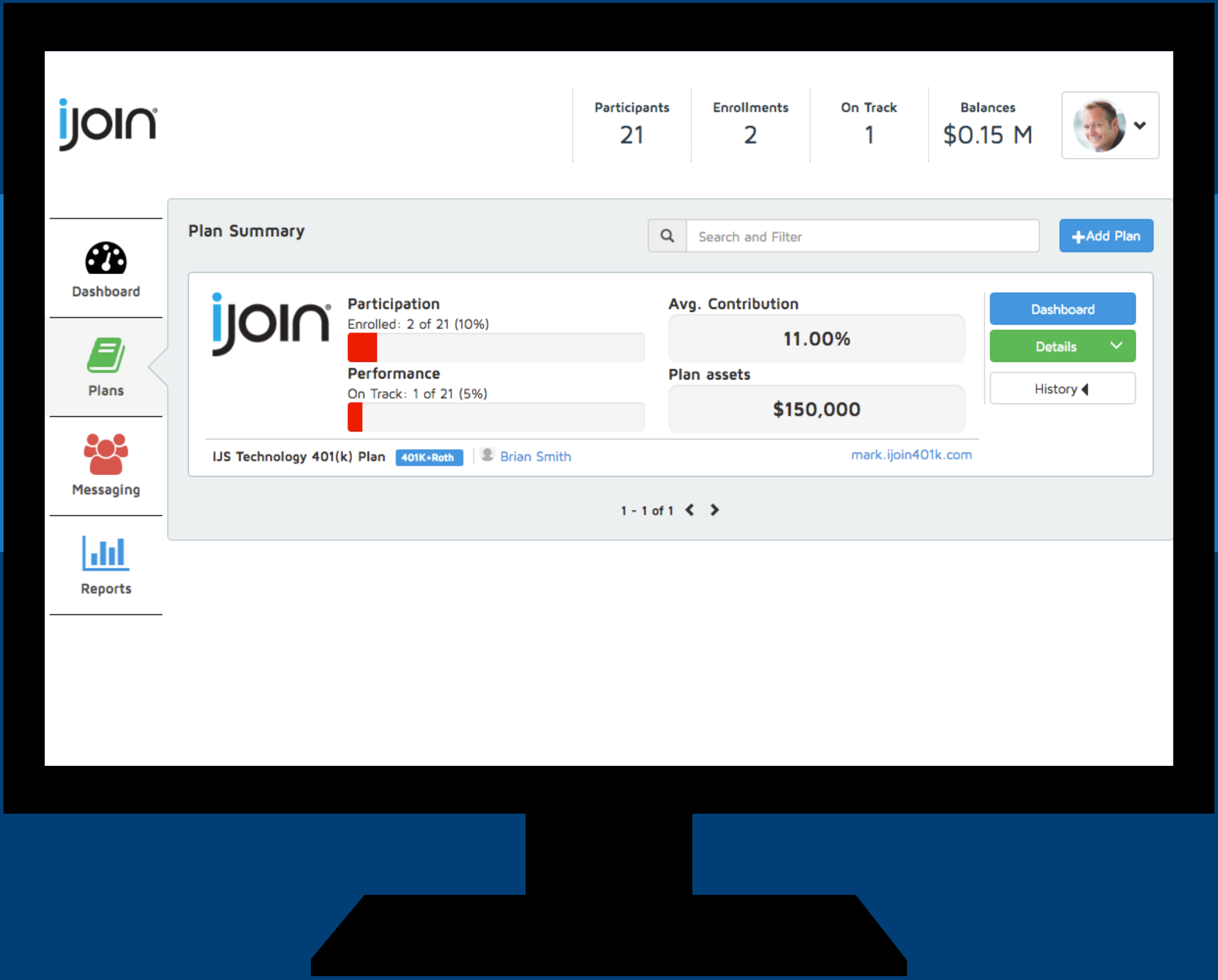
DEMOGRAPHIC CHARTS

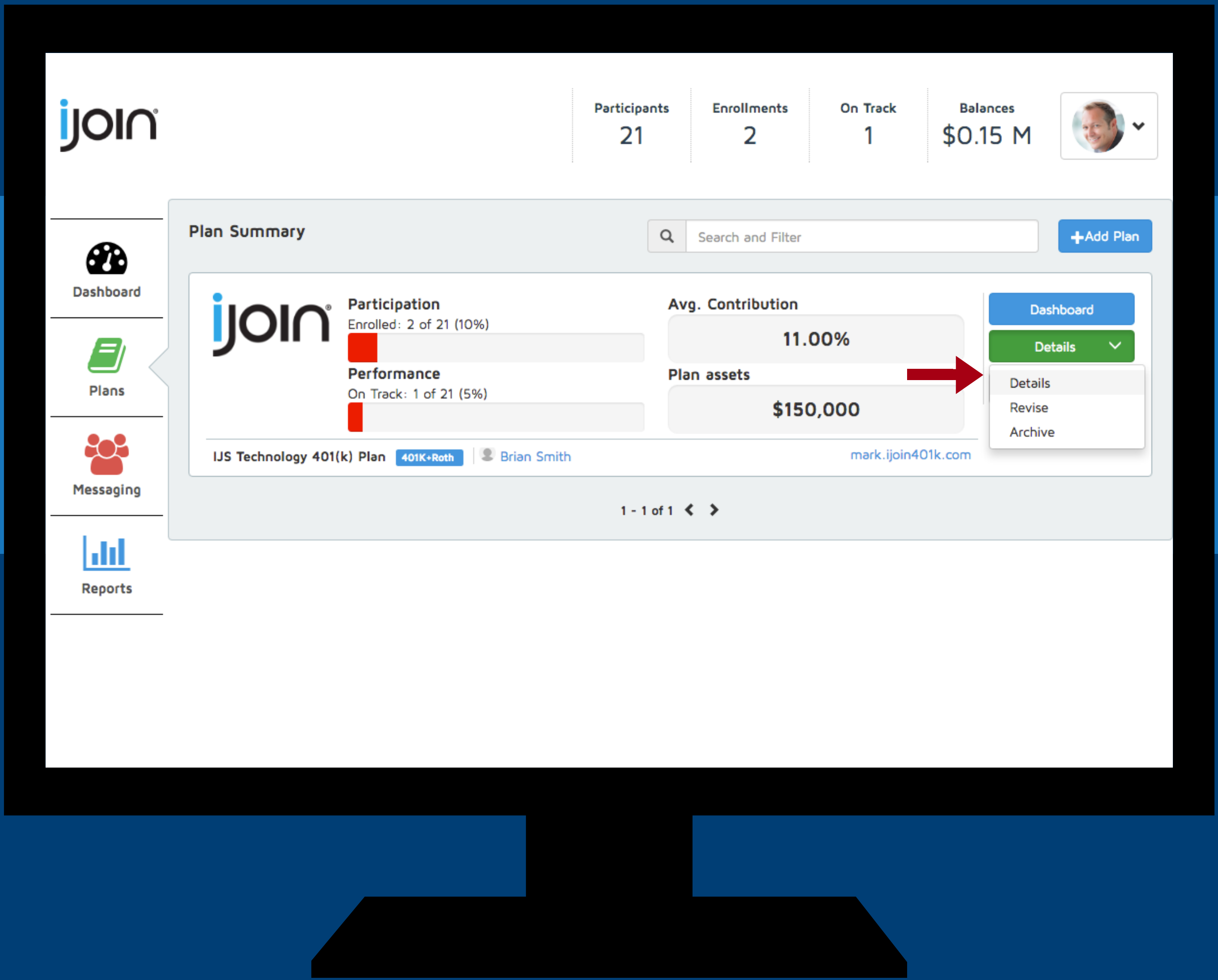
Participant versus Enrollment Age + Gender Demographics

PLANS



The Plans Tab enables you to view all the plans at a glance.

PLAN SUMMARY



To view information on a specific plan, click on the plan itself or click "Details" > then, "Details" again

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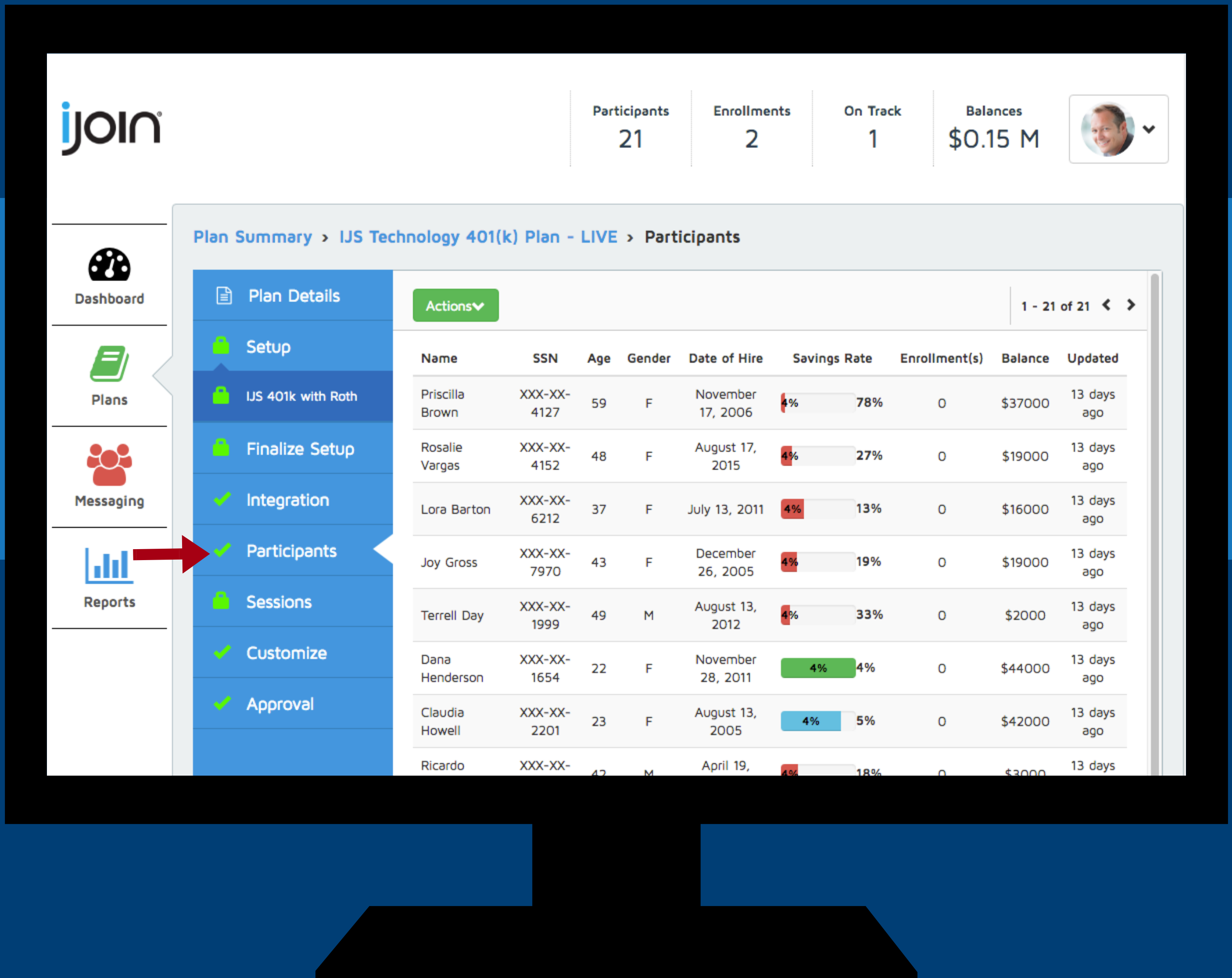
PARTICIPANTS



All enrolled participants can be viewed under the Plan Tab after selecting your desired plan by clicking "Participants" in the blue side panel.

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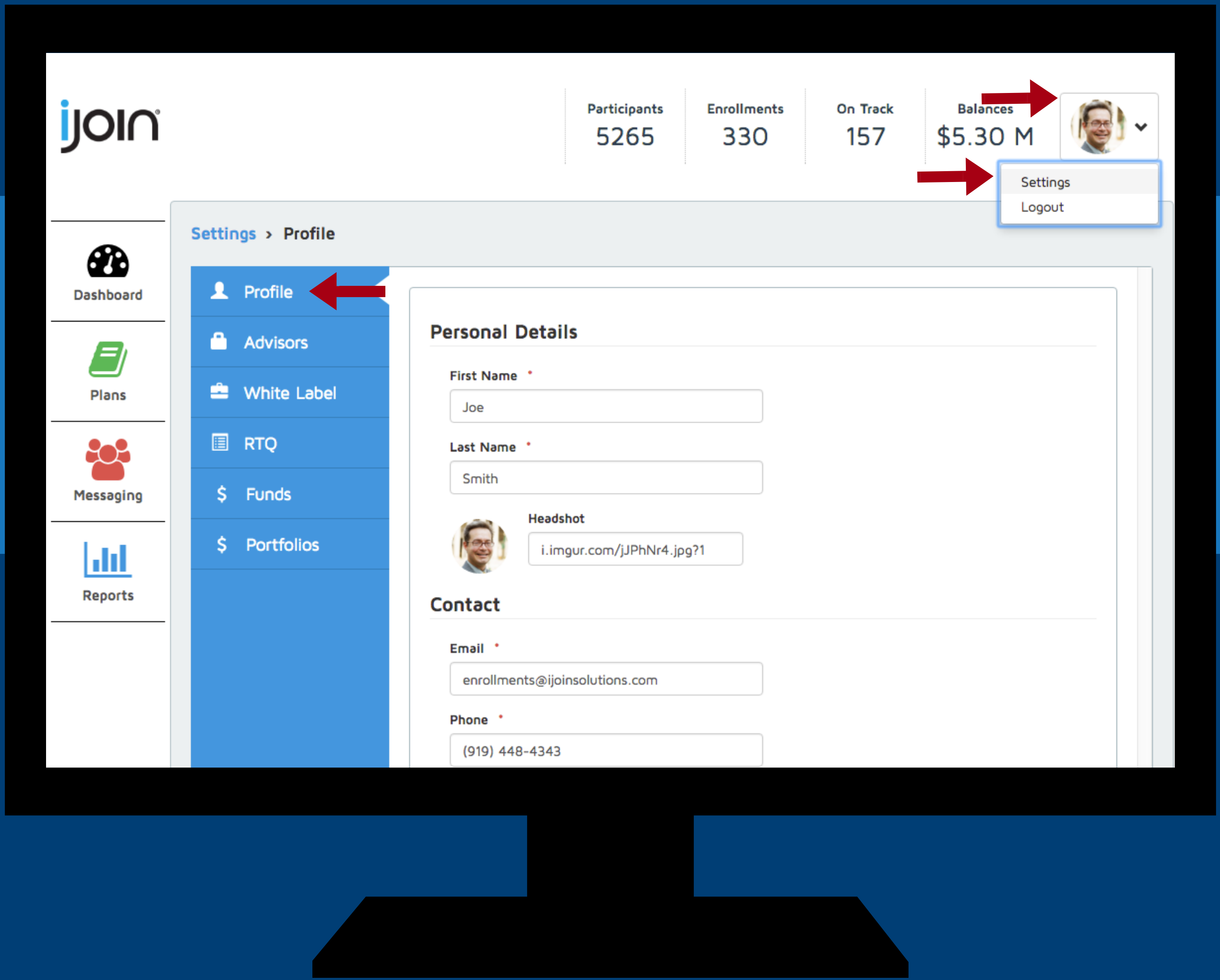
PROFILE



To access the Profile, click the advisor photo > "Settings" > "Profile" tab. The profile lists the personal information of the advisor.

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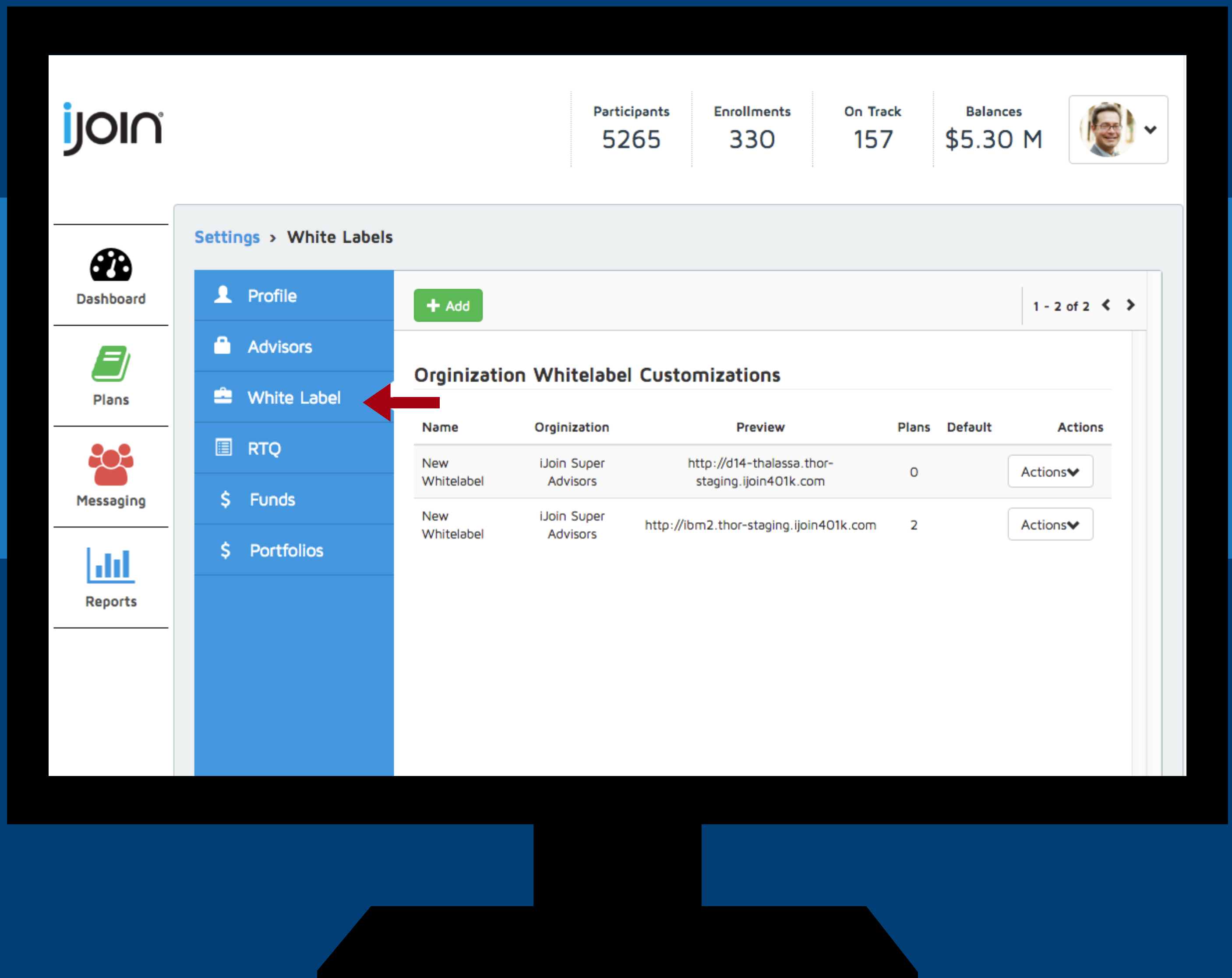
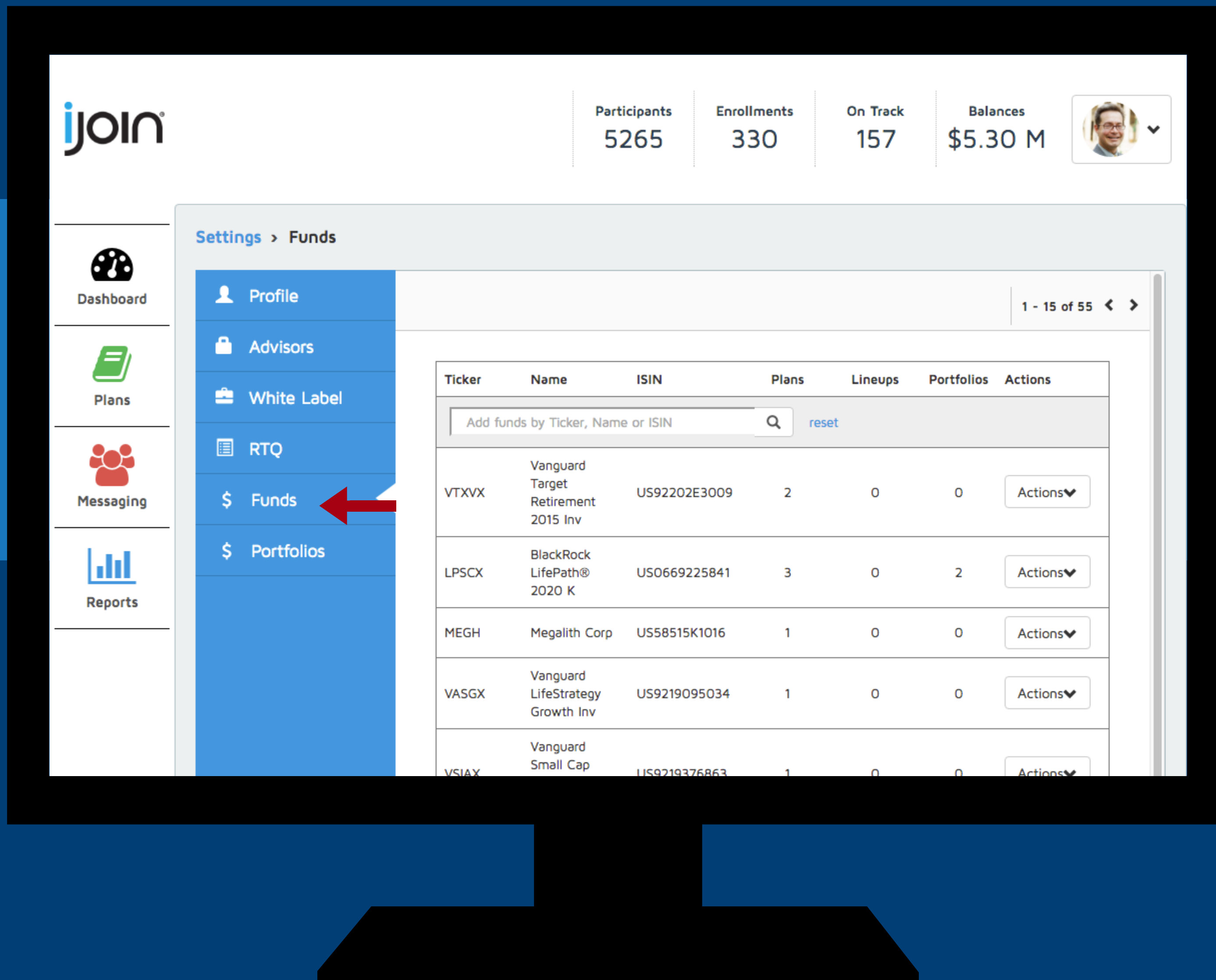
WHITE LABEL



To access the White Label, click the advisor photo > "Settings" > "White Label" tab.

The White Label is customizable.

FUND LIST



To access the Funds, click the advisor photo > "Settings" > "Funds"