

All Plans



## **Dashboard**

Clients

Investments

Resources

Reporting

Standard Reports

Report Scheduling

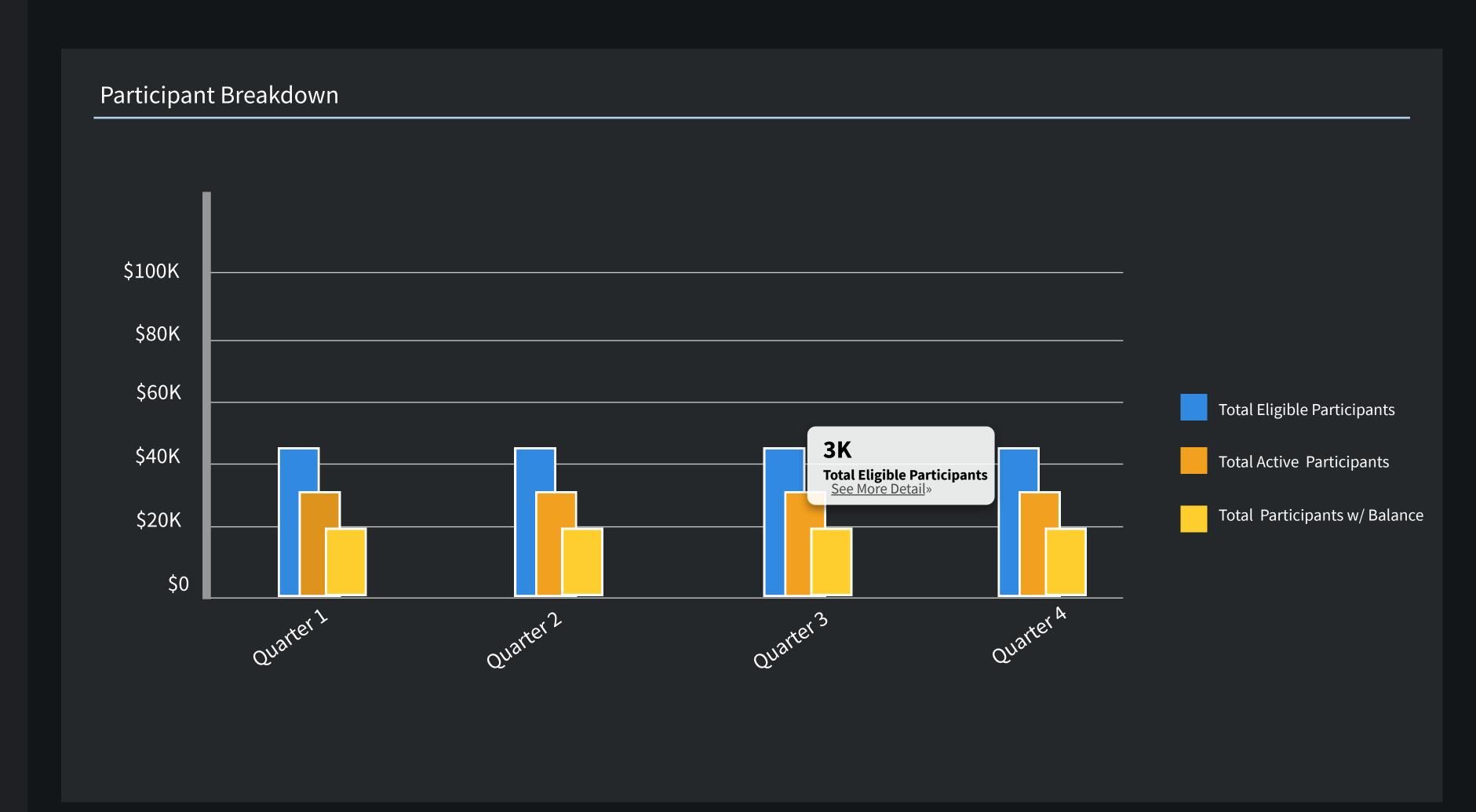
**Custom Reporting** Data Downloads

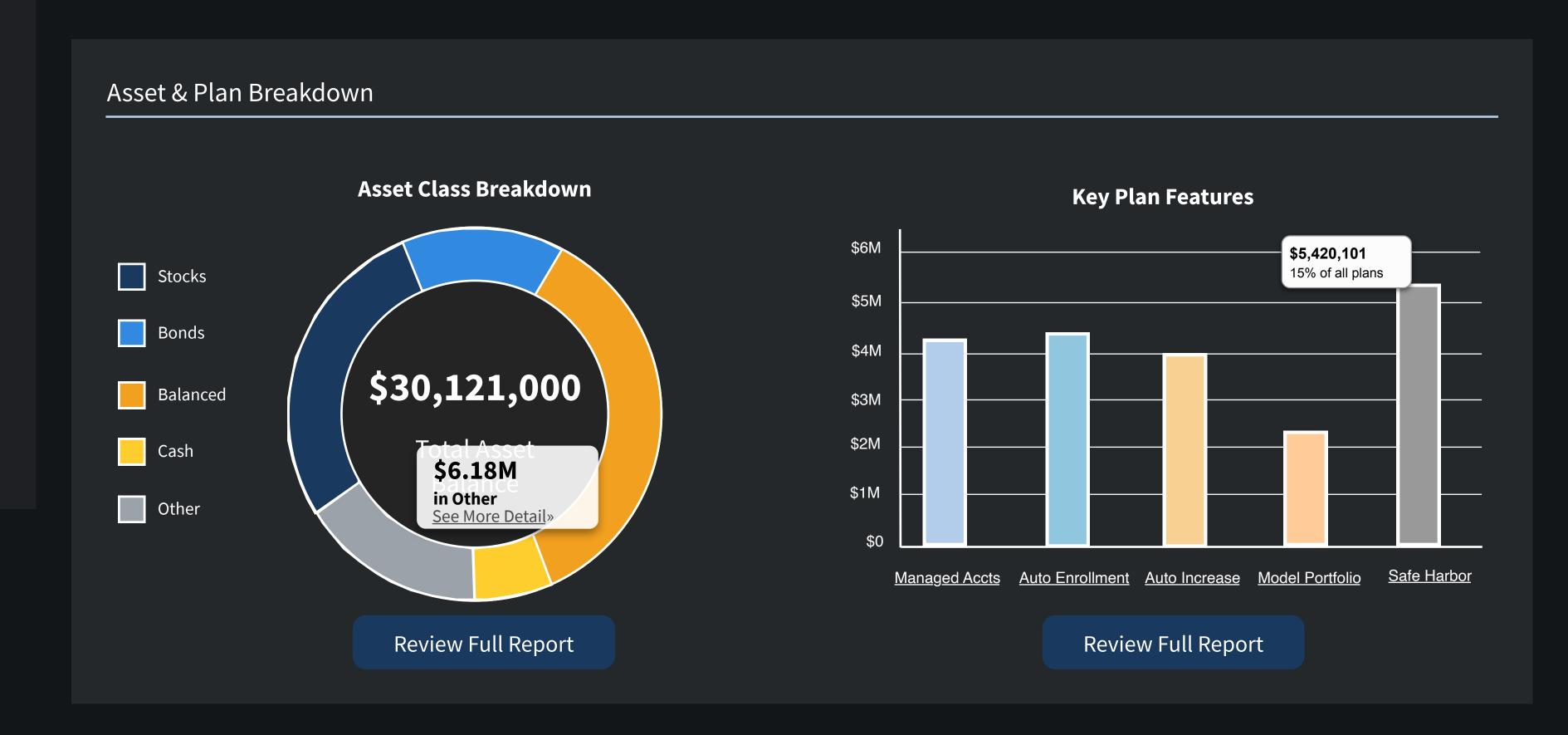
# Dashboard

▲ Today's Tasks

Today's Numbers

| TOTAL ASSETS             | TOTAL PARTICIPANTS       | PARTICIPATION RATE        |
|--------------------------|--------------------------|---------------------------|
| \$30.12M                 | 1,125                    | 58.4%                     |
| <u>See More Detail</u> » | <u>See More Detail</u> » | <u>See More Detail</u> »  |
| TOTAL PLANS              | NET CONTRIBUTIONS        | RETIREMENT SUCCESS RATE   |
| 42                       | \$191,101                | 45.02%                    |
| <u>See More Detail</u> » | <u>See More Detail</u> » | <u>See More Details</u> » |













| Dashboard Recent Activity Market Insights Communications Profile Documer |
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## Documents

Upload File

| Name                | Modified  |  |
|---------------------|-----------|--|
| Statement Documents | 8/21/2021 |  |
| Confirm Documents   | 8/21/2021 |  |
| Tax Documents       | 8/21/2021 |  |