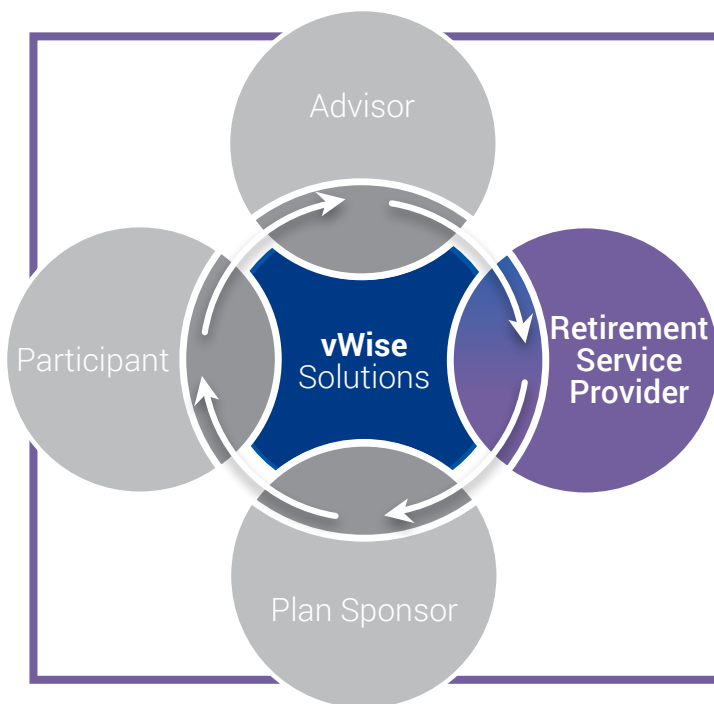


The vWise Advantage

Addressing challenges and creating value



vWise Solutions Help Retirement Service Providers Retain Clients

Providers that offer innovative solutions like vWise, offer great appeal to Advisors and Sponsors alike.

vWise solutions give retirement plan service providers another way to **engage** and **add value** to their clients—Plan Sponsors. Simplified collection of emails and plan/company logos enhance the interaction with sponsor and the participant.

Success Story

For providers, winning new business is important, but just as crucial to the continued success of their business is the retention of clients. vWise solutions are proven to support the goal of client retention.

PROVIDER PROFILE

Contact: Founder, CFO **Location:** Southeastern U.S.

Total Book of Business: 350+

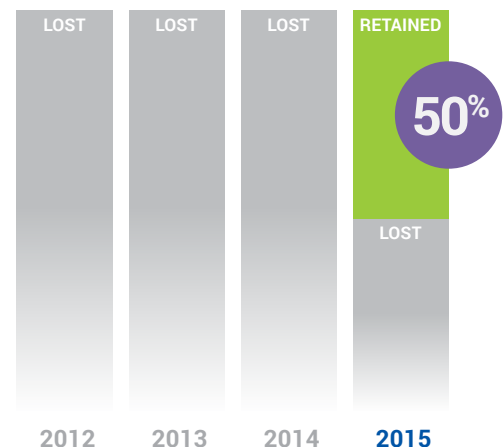
Privately held, independent record-keeping and administration firm for employer-sponsored retirement plans

Special Note: Also includes MEP relationships

For three consecutive years, this provider struggled to improve client retention levels but was unsuccessful. Plan Sponsors continued to take their retirement plans to other record-keepers. Realizing that something needed to change, SmartPlan was implemented to enhance and revive the participant experience and provide the plan sponsors with improved reporting and engagement. **It worked.**

In 2015, the provider reduced its client termination rates by 50%.

The only change in service model was the addition of the vWise solution.



TO LEARN MORE about how vWise can help you win and retain business, contact us at:

☎ 877-820-8212

✉ info@vwise.com

🌐 www.vwise.com

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