



- Dashboard
- Recordkeeper Profile
- Reports
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Welcome back John

Your Progress

15

Comparisons have matched your solutions

+17% this month

8

Proposals have matched your solutions

-13% this month

10

of 5,000 Proposals to-date

-13% this month

Current Pipeline

Open	xxx	#PPTS	xxx
AUA	xxx	Projected Revenue	xxx
AUA	xxx	Projected Revenue	xxx
AUA	xxx	Projected Revenue	xxx
AUA	xxx	Projected Revenue	xxx

John Doe Pipeline

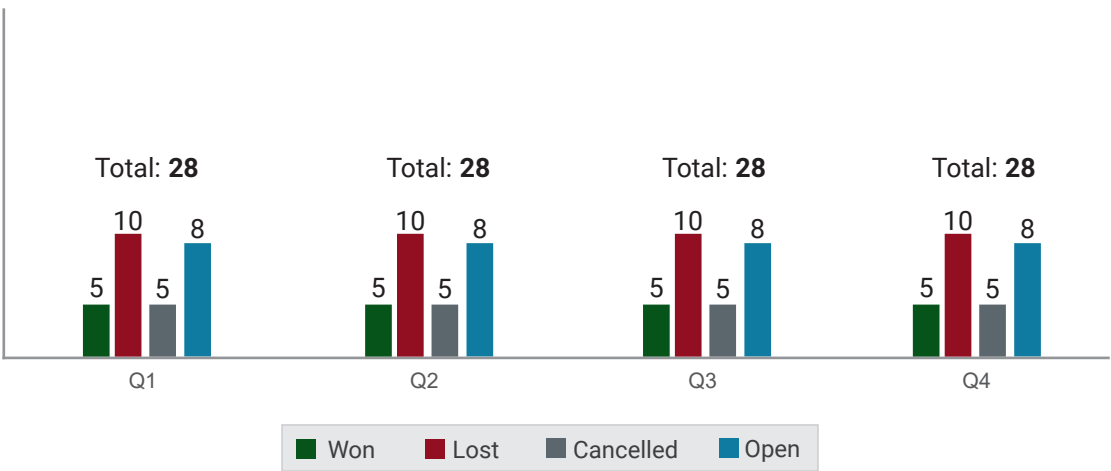
By Plan

Month

Current status

Quarter

Proposed date



YTD Totals

Latest News

Congress Just Passed the Biggest Retirement Bill in More Than a Decade
Here's What You Need to Know

New rules for retirement plan RMDs just got even more confusing

Some seniors have enough income coming in from various sources that they don't need to withdraw money they've saved in tax-advantaged retirement accounts.

But after years of waiting, the IRS eventually wants the taxes due on such accounts, forcing investors to take required minimum distributions, or RMDs, from their individual retirement accounts (IRAs) and/or workplace retirement plans such as a 401(k).

Readers have often complained to me about RMDs, including their fear of the huge penalty for failing to withdraw the correct amount.

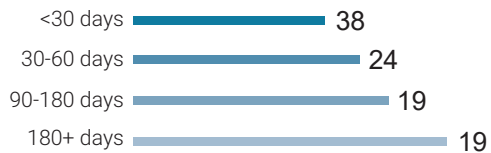
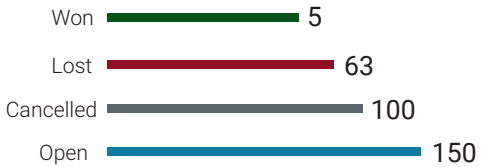
Year-to-Date Activity

Current Status

Proposed Date

Year-to-Date Activity - 228 proposals

Export





☐ Dashboard

☐ Recordkeeper Profile

☒ Reports

Marketing analytics

My proposal analytics

Advisors & investments

☐ Administration

Dashboard > Reports > Advisors & Investments



Advisors & Investments


Total Performance


- ☒ Advisors ☐ Firms
☐ Investments ☐ Plans

Display: ☒ Advisors ☐ Firms ☐ Investments ☐ Plans

Include: (Drag to order)

 By revenue





 By plan count

 By assets

 By Participants

Not displayed

▼ Jeff Doe

Revenue:  67k
Plan count:  5
Assets AUA:  6.7m
Participants:  23

▶ Kim Doe

▶ Ken Doe

▶ Lisa Doe

▶ Laura Doe

▶ Lenny Doe

▶ Mike Doe

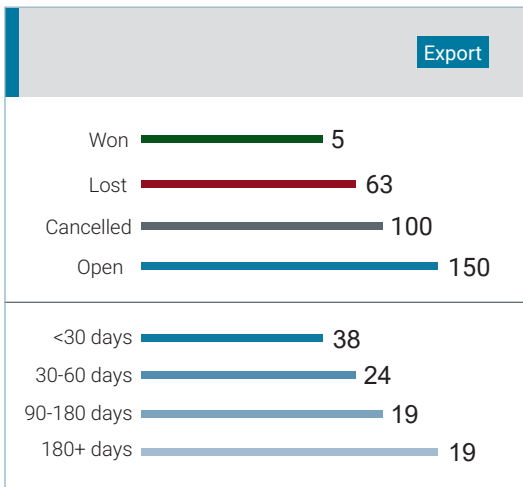
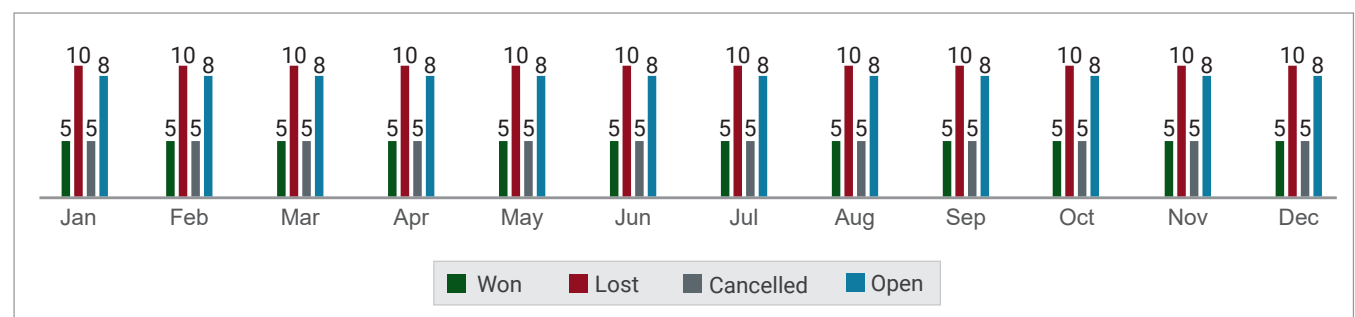
▶ Tim Doe

▶ Vance Doe

▶ Victor Doe



- ☐ Dashboard
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 - Marketing analytics
 - My proposal analytics
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- ☐ Administration



Displaying timeline by date:

☒ Won

☐ Lost

☐ Cancelled

☐ Open

Filter by date:

Apply Filters

▼ Plan A							
Status	Projected revenue	AUA	#ppts	Advisor	Firm	Created	Modified date
Won	\$4,345,124.00	\$31,345,124.00	37	John Doe	The Doe Firm	01/23/2019	03/23/2020
Won	\$4,345,124.00	\$31,345,124.00	37	John Doe	The Doe Firm	01/23/2019	03/23/2020
Won	\$4,345,124.00	\$31,345,124.00	37	John Doe	The Doe Firm	01/23/2019	03/23/2020

► Plan B

► Plan C

► Plan D

► Plan E

► Plan F

► Plan G

► Plan H

► Plan I