

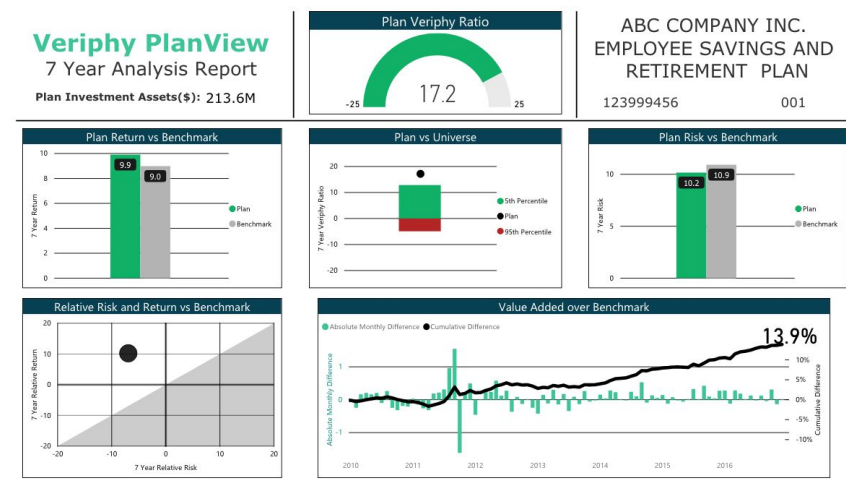


Mission critical, on-demand data and transparency of Retirement Plan Outcomes

A “Plan Performance Dashboard”

Veriphy provides elegantly simple and accurate due diligence tools for each constituent in the DC Plan community. An elegant, point and click dashboard delivers data to drive excellent decisions plan outcomes and identify true opportunities for all constituents.

(Including Risk)



WHY VERIPHY PLANVIEW?

Measure and Monitor the true investment value added to your Plan outcomes.

Protect yourself against fiduciary liability

One click to gain understanding, and reduce your risk and saves 90% of your prep time.

VeriphySM Analytics, Inc.
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The New Standard of measurement is here.

"They have broken the code for fiduciaries."

Chip Hunt, President and Founder, **PrimeTRUST Advisors**



*In my opinion, what Veriphy has done is truly groundbreaking. **They have broken the code for fiduciaries.** With all the emphasis on Plan fees, this system allows fiduciaries to see what they are getting for those fees in order to render a value judgment as to the reasonableness of fees and quality of advisory services and committee decisions.*

There is a tremendous amount of data available to look at 401(k) plan performance and if you're like most CFO's on a plan committee, you have about 2% of your work hours to spend on the 401(k) plan. Yet, you end up with personal responsibility and liability to assure that the plan is performing well and that the fees are reasonable. Still, in spite of in-depth fund analysis and pages of reports, you still might wonder how the plan is doing.

Here are five KPI's for a plan that can give your plan committee a good indication of plan performance.

1. What is the annualized return of our plan over the last seven years?
2. How does that compare to our unique plan benchmark's return?
3. How much risk are our investment options delivering vs. the benchmark?
4. How much added value have our investments added above our benchmark over the last seven years.
5. What is the plan's Veriphy Score?



CFOs often lead or are seen as the “go to” individual on an investment committee. You need to understand best practices for extracting the most useful information.

Best-in-class CFOs have moved away from typical reporting methods; instead, they enable self-service reporting and specifically focus on plan outcomes analytics. This is done with a tool like the [Veriphy PlanView Report](#). It is a “Plan Performance Dashboard.” In three to five minutes you can understand the value being provided by plan investments; how much value was added and how much risk was taken. Seasoned CFO’s tell us this can save them up to 90% in prep time for committee meetings. In addition, you will see which specific funds (and asset classes) have added value and which ones haven’t. This provides immediate knowledge on how to focus questions.

Among top CFOs, 75% provide effective KPIs to the right stakeholders. With all the litigation in the marketplace, would your Board of Directors and Executive team appreciate a simple one or two-page report on the health of the 401(k) plan?

Why use KPI’s? KPIs provide a tangible way to increase your demonstrated understanding as a strategic business leader.

The Executive Team may be the loudest clamoring for metrics, but getting a handle on the actual plan outcomes will help an organization understand the key aspect of a plan’s performance and its impact on employee financial health as well as the present value of future costs. By reviewing timely, accurate and predictive KPIs, best-in-class finance organizations can build consensus around retirement plan expectations and accountability.

VeriphySM combines the historical investment holdings and fund changes in a retirement plan with a risk/reward performance algorithm to measure the value added to a 401(k) or 403(b) Plan by the fund managers chosen and an Investment Professional’s skill.

Learn more by visiting <https://veriphyanalytics.com> and requesting a demo.

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