

SmartPlan™

Interactive Web-Based Video Software



Engage. Educate. Enroll.

Key Benefits of SmartPlan:

- Higher enrollment
- Increased contribution levels
- Fewer on-site live meetings
- Improved financial education
- Reduced support costs
- Fulfill some fiduciary duties, with analytics and tracking of user visits and actions
- Accessible to participants 24/7/365
- Continued support from resource center
- Reach more participants in multiple locations
- Educate & enroll participants

Introducing SmartPlan. This revolutionary interactive web-based video software is proven to increase retirement plan participation, helping to fulfill some fiduciary responsibilities while reducing the need for print communications and on-site meetings.

SmartPlan is designed to engage, educate, and enroll employees. Video hosts discuss plan features and the benefits of participation, and then guide users through an interactive process that helps them discover their individual retirement needs and risk profile, as well as choose plan investments and contribution amounts.

SmartPlan is fully customizable to your plan and easy to use.

For more information contact your Cherry Bekaert Benefits consultant today at: 411pensions@cherrybekaertbenefits.com