



PERSONALIZATION IS TRENDING.

Make It Your Advantage.

The days of one-size-fits-all retirement plans are ending as trends towards personalization accelerate. The advisor challenge is to deliver a highly personalized experience at scale and be able to analyze and report on trending success.

71%

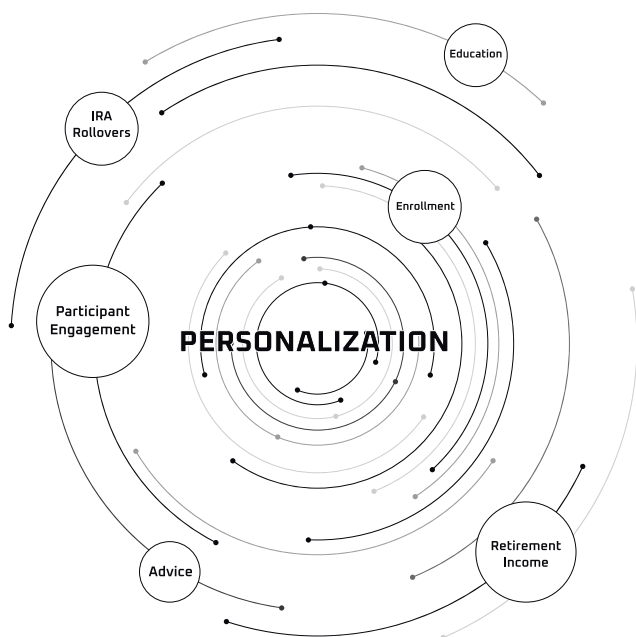
of consumers expect a personalized experience.¹

77%

of people surveyed believe that **having a personalized investment portfolio will help better prepare them for retirement.**²

87%

of plan participants are **comfortable sharing information with employers in exchange for more personalized benefits.**³



Best-In-Class Personalization means projecting needed monthly retirement income and keeping the goal always in view. Personalization flows through enrollment, education, engagement, financial planning and advice offerings.

Leverage iJoin's personalization at scale to differentiate and win.

01. Source: 2021: McKinsey and Company, "The value of getting personalization right - or wrong - is multiplying"
02. Source: Pollfish survey based on 1,000 employees in the United States aged 45-65 who had access to a workplace retirement plan and had an account balance of at least \$1. Survey commissioned by Smart USA
03. Source: Franklin Templeton's Voice of the American Worker survey, 2023

iJoin. Access is everything.

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