



Rollover Analyzer

Individuals are often faced with the challenging decision of whether to rollover their plan assets out of their company sponsored retirement plan or to keep it in the plan. The Department of Labor's Prohibited Transaction Exemption (PTE) 2020-02 requires financial professionals to document and have practice level oversight of their IRA rollovers.

Financial Professionals need an easy to use and scalable process that allows them to comply with PTE 2020-02 with minimal effort and maximum effectiveness. RPAG's Rollover Analyzer is an easy-to-use system that helps document the rollover process with a few easy steps. The Rollover Analyzer helps advisors with key objectives:

Information about retirement investor

Information about current plan investments, services and fees

Information about rollover investments, services and expenses

Objective analysis to determine option in the investor's best interest

Oversight of all recommendations by firm

RPAG Rollover Analyzer Highlights

- Easy-to-use system with seamless workflow and report generation
- The output documents the rollover recommendation that financial professionals make to participants
- Integrates with RPAG's Retirement Plan CRM, pulling plan investment and fee information
- Integrations with RPAG's PlanFees fee benchmarking data allows you to compare fees when plan documentation isn't provided or 5500 data is incomplete
- Easily pull plan data from the DOL website or through Larkspur Executive integration.
- Oversight of all Rollover Analyzer recommendations captured through Advisor IQ for advisory firms or Enterprise IQ for enterprise BD/RIA users.

For more information about the RPAG Rollover Analyzer, please contact support@rpag.com or call 949-305-3859.

