

## Streamlined Planning

403(b)/457 advisors are busy battling client's apathy towards retirement planning and saving. That's why we created The Retirement Analysis Kit (TRAK) as your solution to addressing the complexities of this niche market. TRAK has become the first choice of the 403(b)/457 advisors everywhere.

TRAK is a one stop solution for every complexity. **With over 700 pension plans built-in**, you no longer have to juggle multiple benefit calculators or ask clients to bring in their statements.

TRAK illustrates survivor options, COLAs, cash balance options, and even PLOPS or DROPS.



## Simple and Interactive

TRAK's integrated needs analysis combines plan benefits, Social Security, 403(b), and outside assets so you can educate your clients and answer their most pressing questions.

If they have a shortfall, ask how they want to solve it. Quickly and easily show them what it means to retire earlier or later. Interact with survivor options so they can decide what is best for them and their loved ones in retirement.



## Familiar and Empowering

With TRAK's paycheck analysis, you can build from what is already familiar to your clients: their pay stub and take-home pay. Illustrate clearly what is being suggested, find additional funding for retirement, show how account funds accumulate until retirement, and motivate them to make changes to achieve retirement readiness.



## Differentiating

TRAK makes the most complicated aspects of retirement planning simple, understandable, and engaging. With built-in pension knowledge, graphical presentation, and powerful reports, TRAK provides opportunities for interactive conversations and takeaways that help your clients think clearly about retirement options. At the same time, it helps advisors discover outside assets and present new investment solutions.

**Many advisors have increased their business 3x with TRAK!**



Stand out, forge powerful connections, grow your business

“When clients see the TRAK software and go through it with me, they become far more engaged in the actual planning process.”

Chris Janeway  
403(b) Advisor

Let's see what TRAK can do for you!

Start your trial today:

