Compass is a premium module that can be added to your Retirement Plan Prospector Subscription.

**OVERVIEW:**
By dissecting the Schedule of Assets across 50,000+ of the largest retirement plans, Compass introduces the transparency and market intelligence that successful DCIOs and asset managers are looking for. By indexing mutual fund holdings and normalizing the data, Compass allows for detailed analysis.

**COMPASS DATA COVERS APPROXIMATELY:**
- 70% of all DC Assets
- $1.9T worth of DC Assets
- 60M DC Participants
- 50k DC Plans

What is Compass?
Compass is a tool that allows users to search and analyze information on the mutual funds held by large 401K plans. The Compass product cleans up and indexes Schedule H data, making information regarding employer mutual fund investments searchable and optimized for broker sales, prospecting, market analysis and recruitment.

Connect with our knowledgeable reps today.
Call 800-231-0669, option 1  |  Email sales@judydiamond.com
Visit judydiamond.com
Target the Competition

• Go on the offensive by identifying 401(k) plans whose lineup includes underperforming or troubled funds.

Increase Plan Retention

• Asset Managers do not always know which 401(k) plans offer their funds, especially when those plans are traded through an omnibus account. Use Compass to find clients using your funds, and make sure they are being well served.

Calculate Market Share

Find new market opportunities and identify competitive threats by discovering:
• How many plans offer a particular fund
• How much money is being invested in that fund
• How many plan participants are eligible to invest in the fund
• For plans offering that fund, what percentage of plan assets are actually invested in the fund
Access Clean, Normalized Data

• “As filed” data can be difficult to parse, and is not always useful for purposes of search, data aggregation or assessing market share.
• Compass uses a complex algorithm to match dirty fund data against Google and SEC records, to ensure portfolio-level matching, allowing you to extract the most value from it.

Reach Out

• Compass gives advisors the ability to reach out directly to employers holding your funds and capture personal rollovers and distributions. Discover and connect with employers who are invested in your funds, even those sold through a third-party platform
• Contact brokers and recruit them to sell your funds.

Who can benefit from Compass?

• 401(k) brokers and consultants looking to create a more effective and dynamic presentation
• Market Intelligence professionals trying to analyze market share by fund, fund family, industry, geography and more
• Mutual Fund analysts determining market trends by monitoring funds with significant market change, and how plan participants are investing their money
• Internal wholesalers looking to contact, recruit, and support brokers

Request a Demo

It’s easy to upgrade. Simply contact your Judy Diamond Account manager and ask for a demo. Our 5500 experts will walk you through the capabilities of Compass, and share some insights into the best practices that our clients use to get the most out of this data.

Reach us at 800-231-0669. If you’re not currently working with a Judy Diamond Representative, just ask to speak to someone about Compass.

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