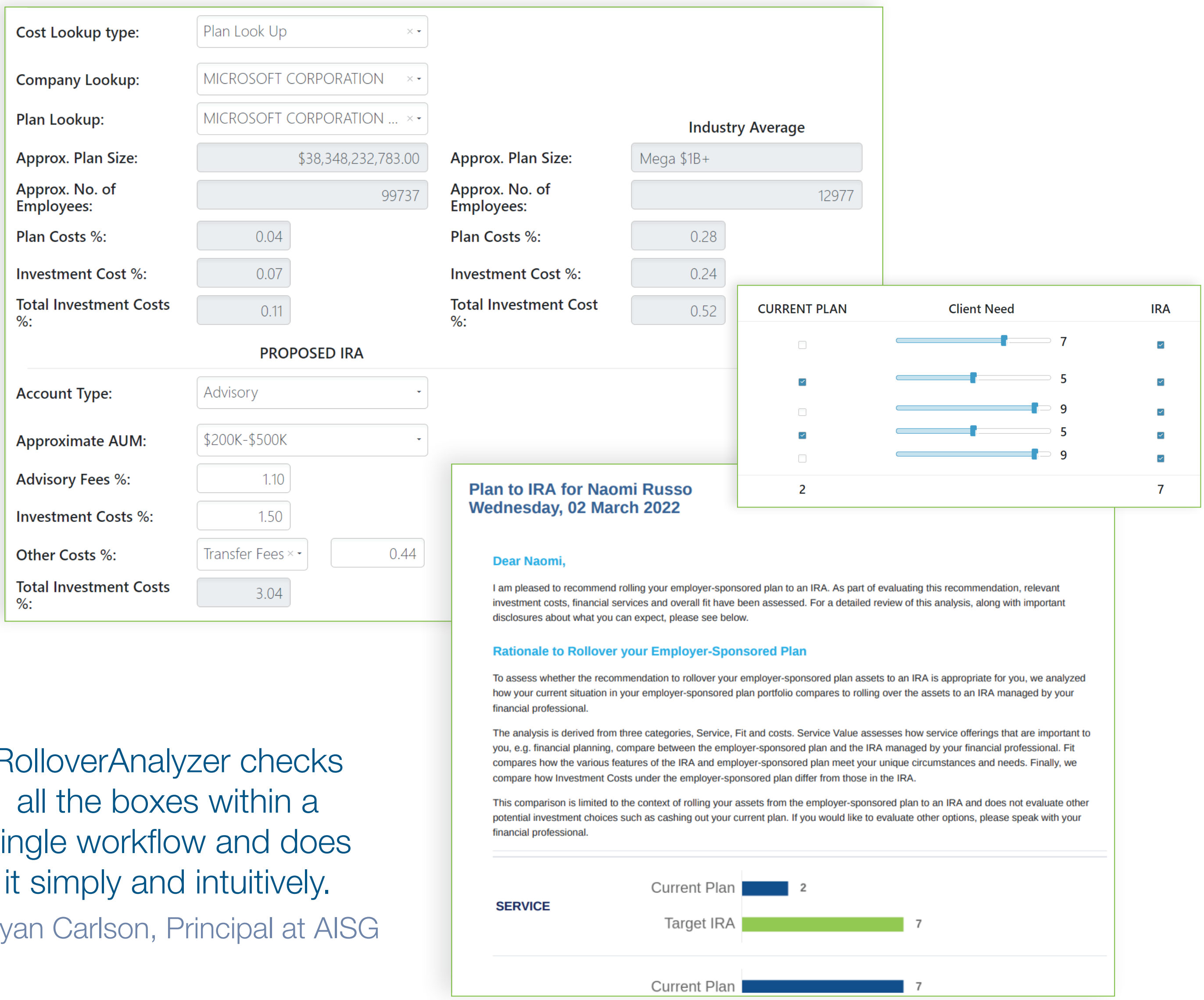
InvestorCOM

RolloverAnalyzer™

Single workflow for recommending, documenting and disclosing rollovers.

WATCH VIDEO

- ✓ Compare rollovers based on client fit, service value and investment costs.
- ✓ Assess plan costs via a built-in integration to Form 5500 and benchmark data.
- ✓ Document the recommendation and disclose with the client in one click.



> RolloverAnalyzer checks all the boxes within a single workflow and does it simply and intuitively.
>
> – Ryan Carlson, Principal at AISG

> Choosing InvestorCOM to meet our regulatory obligations for Reg BI and PTE 2020-02 was an easy decision. RolloverAnalyzer empowers our advisors to grow their business through pursuing rollover opportunities, while making compliant recommendations that are in the investor's best interest.
>
> – Shannon Spotswood, President, RFG Advisory

> With access to a comprehensive rollover analysis tool, our Financial Advisors can easily document their comprehensive discussions with clients about moving their retirement dollars.
>
> – Risa Gomez, First Vice President of Retirement Plan Services at Davenport & Company

> We recognize that meeting the PTE 2020-02 requirements is most efficiently accomplished by utilizing compliance technology – there are far too many factors for an advisor to consider.
>
> – Ryan Carlson, Principal at AISG

See a demo of RolloverAnalyzer

InvestorCOM.com/demo

About InvestorCOM Inc.

InvestorCOM is a leading provider of regulatory compliance software and communications solutions for wealth managers, asset managers and insurers in the financial services industry. Our high value, intuitive solutions eliminate compliance risk for our clients.

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