

# The *DDW* 401k ComparisonPro Tool (Aka *The PTE 2020-02 Tool*)

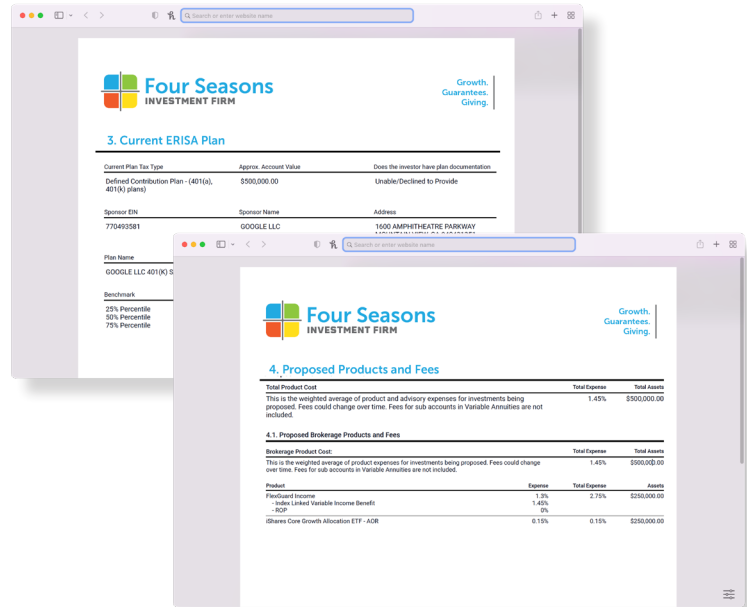


We know it's hard. That's why we make it easier.\*

\*PTE 2020-02 is too hard to make “easy” so we focus on “easier.” Some call our tool the “easiest.”

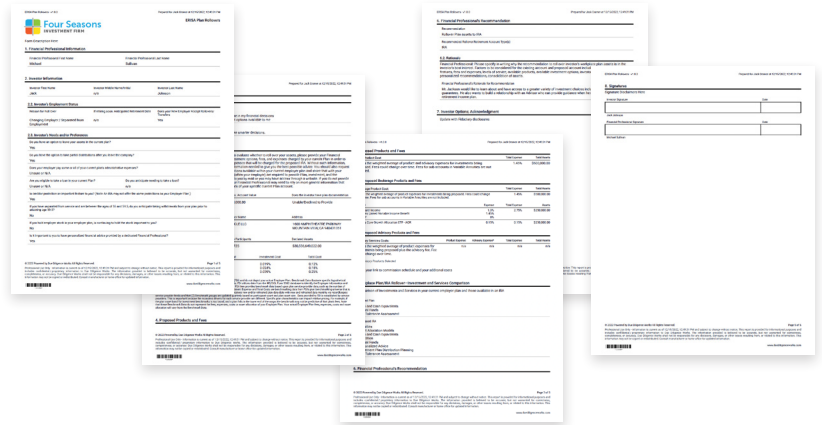
## 1. The Comparison of Current vs. Recommended is made easier because we...

- Integrate with both a 5500 Plan Database and Record-Keeper Level Benchmarking\* (Why both? Because it's more accurate.)  
\*Based on over 325,000 Plans.
- Integrate with Your Approved Product Universe (both Brokerage and Advisory products)



## 2. The Documentation is made easier because we...

- Capture a complete record of all answers, recommendations and fees
- Create a PDF for easy sending and storage
- Route documentation to fit your Supervision and Compliance Processes



## And because Cost can be hard, we make that easier 2 ways:

1. One price for your entire firm (no “price per month per person” because we want to encourage everyone to use it)
2. Most customizations are included in the price. (We include customization of the Question Set, Report Output, Disclosures, Approved Products and Branding.\*)

\*All we ask is that you keep customizations to a reasonable level as determined by using the Williams test.

### Questions?

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