



miEdge™

THE ULTIMATE UNFAIR ADVANTAGE

Wicked Smart Prospecting



Retirement

Easily search 401K Plans, DC, DB Plans

Clean, accurate, current data

404c and Fidelity Bond Compliance

Analyze plan asset size, participation
& contributions

Research broker/consultants, corrective
distributions, 12b1 fees

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Retirement

Provides quick and easy access to Form 5500 Pension filing information.

- Identify employers by plan size
 - Assets, eligible employees, retirees
- Compliance characteristics
 - 404C, ERISA, Fidelity Bond
- Participant contributions and loan balances
- Identify large centers of influence
 - Advisors, TPA's, Accountants
- High net-worth business owners

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