



# The Consultant Access Portal

CPI has developed one of the most powerful web tools ever delivered to advisers. Our Consultant Access Portal (CAP) offers you a multitude of plan management tools and custom reporting capabilities.

- ▲ This tool will **help you identify ancillary business opportunities** with your retirement plan sponsors and their participants. This tool will also help you retain your book of business and grow it to new levels.
- ▲ Create **the ability to send an email message to plan participants** with an email address stored in our system.
- ▲ Convenient **access to education newsletters** for both the participant and plan sponsor.
- ▲ Access to the plan's quarterly and annual **valuation package(s)**, including any test results stored in our system.
- ▲ Ability to create a list of **newly eligible participants** over several upcoming entry dates, in addition to a list of those who are eligible, but not currently participating; updated once per quarter.
- ▲ **Centralized contact information** section including names, addresses, telephone numbers, and email addresses for plan contacts at your office, your client's office, and here at CPI.
- ▲ **On a plan level:**
  - » Access to a list of funds
  - » Fund fact sheets
  - » Statement on demand at both participant and plan sponsor levels
  - » Transaction history with the ability to sort information by transaction type
- ▲ **Access to the plan document**, Summary Plan Description, and Summary of Material Modifications for plan amendments.
- ▲ Ability to **post messages to your client(s)** and plan participants.
  - » Hyperlinks allow the user to point and click to create an email message to the desired contact.
- ▲ Ability to **view information on a participant level** by social security number or by name.
- ▲ Ability to **view the status logs for distributions and conversions.**
- ▲ Ability to compile and **view a list containing all of your plans** stored in our system containing the following data:
  - » Dollar value of plans assets
  - » Number of eligible employees
  - » Number of active participants
- ▲ **Convenient list hyperlinks** allow access to **The FYI Manual** as well as access at both Plan Sponsor and participant level information.
- ▲ Ability to send out a mass mailing to all plan participants or employees by downloading a mail/merge list. The criteria used to develop the list may consist of:
  - » Age
  - » Date of termination
  - » The number of funds in which participants are invested
  - » Specific funds in which participants are invested
  - » Total plan assets

**Did you know** we can add a link to your personal home page on the Plan Contacts page of the participant website, myretirementfuture.com? We can! If you would like to have a **link to your home page** included, just contact your client's CPI plan administrator.

You can also **post a message to the participants on the message board** that appears after login. Just go to the Message Center and, create your message. Where you want the link to appear, **enter the following HTML code:**

```
<a href="http://www.yahoo.com" target="_new">here</a>
```

**Replace http://www.yahoo.com** with the URL (the web address) for your home page..

Make sure you **keep the quotation marks (" ") around the URL**. For example, your URL should look like this:

```
"http://www.advisersite.com"
```

The link will appear on the message board when a participants log into their account on myretirementfuture.com. Participants who click on the link will be redirected to your home page.

**For more information, or to discuss a retirement plan opportunity with one of our consultants, call today.**

**800.279.9916 ext. 765**

CPI Qualified Plan Consultants, Inc. is a member of CUNA Mutual Group, a leading insurance and financial services organization based in Madison, WI.

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