

A Smarter, Faster Way to Evaluate Target Date Funds

The next evolution of RPAG's Target Date Fund Analyzer is here.

Built from advisor feedback and refined for real-world fiduciary use, TDF Analyzer 2.0 goes beyond performance charts to help you evaluate, document, and present TDF analysis with precision and purpose. Add the analyzer to your strategic toolkit to save time, strengthen your processes, and elevate your value to clients.

WHAT'S NEW

- **Misfit Risk Analysis:** Instantly identify where participant behavior and TDF selection may be out of sync.
- **Plan-Specific Inputs:** Incorporate demographics, contribution rates, and withdrawal behavior for personalized insights.
- **Up/Down Capture & Drawdown Analysis:** Measure how TDFs perform through market cycles and stress periods.
- **CIT Equivalency Scoring:** Evaluate CIT-based target date options with a standardized, apples-to-apples framework.
- **Quarterly Monitoring Framework:** Automate plan reviews and fiduciary documentation in one streamlined process.

WHY IT MATTERS

- **Fiduciary Confidence:** Back every recommendation with a defensible, data-driven process.
- **Time Savings:** Replace manual TDF comparisons with an automated, repeatable workflow.
- **Client Impact:** Deliver deeper insights that go beyond fees, helping committees focus on outcomes.
- **Scalability:** Apply a single, consistent methodology across all client plans.

Ready to See It in Action?

Access the Analyzer today or schedule a demo with your RPAG Advisor Support team to explore how TDF Analyzer 2.0 can power your next client meeting.

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