



Fiduciary Benchmarks

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PRESS RELEASE

Fiduciary Benchmarks announces launch of Business Management Dashboard with Global Retirement Partners

Lake Oswego, OR August 19, 2019: Fiduciary Benchmarks (FBI) launches the Business Management Dashboard – an open architecture platform where retirement advisors can bring together all of their data and tools to structure efficient client and prospect workflows. In conjunction with the launch, FBI announced that Global Retirement Partners (GRP) would be rolling out the platform across their advisor group. The Business Management Dashboard will launch with GRP on September 1st and it showcases task and workflow functionality, an enhanced version of FBI's proprietary benchmarking, a sales funnel for prospecting and documentation tracking.

FBI began conceptualizing the Business Management Dashboard in November 2018. The strategic question was “should FBI be a product on someone else’s platform or be the platform?” After conducting a comprehensive marketplace analysis, the FBI Management Team decided that it was better positioned to “be the platform”. In an environment where advisors are changing broker-dealers, converting to RIA’s and joining aggregators at a record pace, FBI does not believe an advisor should have to change tools when the structure of their business changes. This led to the platform’s flexible, open architecture structure where an advisor can bring their tools with them regardless of where they work.

“If you are a Broker Dealer or Aggregator and want all of your advisors on a single platform while giving them access to best of breed tools – the Business Management Dashboard does that.” stated Tom Kmak, CEO of Fiduciary Benchmarks.

“Advisors are being asked to do more with less. The Business Management Dashboard will allow them to build efficient, scalable and repeatable workflows that will improve their results with both clients and prospects” stated Craig Rosenthal, SVP Sales, Service & Marketing of Fiduciary Benchmarks.

FBI is creating a series of single sign-on and real-time API integrations to allow Advisors to use whatever tools they desire in the marketplace. The first integrations being built are concentrating on investment analytics and RFP providers. “The initial conversions with potential integration partners have been almost universally positive. They understand that we are building a marketplace for all industry tool and service providers that want to be represented. The single sign-on and real-time API requirements are minimal and we are here to promote their tools not threaten them. In the end, we are looking to link them together in a way that benefits advisors and their clients.” stated, Matt Golda, SVP of Technology and Operations of Fiduciary Benchmarks.

GRP saw the Business Management Dashboard in its earliest conceptual stages, provided feedback and committed to using it while it was still in development. “Fbi did a great job solving for the day-to-day issues of retirement plan advisors. Our advisors and prospects have all responded with ‘wow’ and can’t wait to start using all of it’s capabilities.” stated Geoff White, CEO of GRP Financial.

“When I first saw the Business Management Dashboard, I was thinking about how it would improve my practice. My thinking quickly transitioned to imagine how powerful this would be if we rolled it out to all GRP advisors.” stated, Joe DeNoyor, Chief Executive Officer of Washington Financial Group.

About Fiduciary Benchmarks: Fiduciary Benchmarks is the industry leader for independent, comprehensive and informative value and fee benchmarking services for the defined contribution space. Fbi also offers the Business Management Dashboard – an open architecture platform for retirement advisors. In addition, Fbi offers services in the IRA space including a Best Interest Determination tool. Founded in 2007, the company now works with many of the industry’s largest and most respected Recordkeepers, Broker/Dealers, Advisor/Consultants and Plan Sponsors.

About Global Retirement Partners: <insert GRP content here>

Learn more at www.fiduciarybenchmarks.com

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