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Advice Analytics Launches AI Personalization for Employee Financial Wellness Communications

SAN DIEGO, CA, March 25, 2022- Advice Analytics, recognized as a “Top Pick” of innovative analytics firms based in San Diego, breaks ground with a new personalized financial wellness communications platform for the retirement benefits industry.

The pandemic not only spawned a “Great Resignation” with 9 straight record months of departures, but also a transformative shift in financial wellness attitudes – particularly amongst younger generations. According to a study, 75% of employees say that it's become more important to work for a company that reflects their personal values while 60% were concerned about their debt.¹ Moreover, diversity, equity, and inclusion (DEI) efforts, digital employee engagement, and financial inclusion have transitioned from the virtual water cooler to boardroom initiatives. As a result, an astonishing 11.3 million job openings have been posted since January 2022.²

Advice Analytics is on a mission to support the new digital, diverse workforce with a groundbreaking Email AI platform that heightens digital employee engagement, communicates financial confidence, and increases contribution and retention. Professionals affiliated with the retirement benefits industry such as employers, recordkeepers, TPAs, and financial advisors all stand to benefit.

Already, the company has received award-winning recognition on analytics innovation by Data Magazine. Unlike other email marketing platforms, Advice Analytics uniquely links content and action to actual measured financial contributions.

“Now more than ever, retirement professionals need innovative solutions that bridge employee engagement with measurable financial outcomes,” - Jerry Yen, CEO of Advice Analytics

¹ “Voice of the American Worker Survey,” Franklintempleton.com, accessed March 6, 2022, <https://www.franklintempleton.com/insights/research-findings/voice-of-the-american-worker-survey.>

² “Job Openings and Labor Turnover Summary - 2022 M01 Results,” U.S. Bureau of Labor Statistics (U.S. Bureau of Labor Statistics, March 6, 2022), <https://www.bls.gov/news.release/jolts.nr0.htm>.



The all-inclusive Email AI platform allows you to:

- ❖ See content that employees are most interested in
- ❖ Access user-friendly AI word cloud and heatmaps
- ❖ Track performance with actionable insights
- ❖ Enterprise-grade secure storage for critical documents and lists
- ❖ Metrics to measure retirement plan trends and benchmarks;
- ❖ Create your competitive advantage.

Industry professionals can use the platform for various purposes. Advisors can help personalize messages to employees in a scalable fashion – using relevant content to increase employee savings and grow plan assets under management. Employers can improve employee engagement, productivity, retention – with a greater sense of co-ownership of personal and firm growth. Recordkeepers can link communications to actual financial impact, improve plan compliance, and automate documentation for their plan sponsor clients and plan participants and their beneficiaries.

“As an innovative plan analytics company, we deeply value our partnership with Advice Analytics. We look forward to working together to deliver the most data-driven communications – with financial impact – across the retirement industry,” - Pete McNellis, Sr. VP at dailyVest

With 84% of employees counting on their employer to deliver better benefits, Advice Analytics believes in the power of relevant communications to drive appreciation – and better financial outcomes.³ Advice Analytics' Email AI platform latest release is available now at www.adviceanalytics.com with affordable fees starting at pennies per participant per month – far less than the cost to replace a highly valued employee.

Learn more at adviceanalytics.com or
<https://www.linkedin.com/company/advice-analytics/>.

³ “Voice of the American Worker Survey,” Franklintempleton.com, accessed March 6, 2022, <https://www.franklintempleton.com/insights/research-findings/voice-of-the-american-worker-survey.>



About Advice Analytics - The company delivers AI and Automation to the 401(k) retirement industry with email AI marketing, dashboard analytics, predictive compliance testing, and automated plan document management.

The company's experience in marketing, retirement, and analytics enables recordkeepers, consultants, and plan sponsors to deliver more effective employee communications and plan compliance. The fintech firm fanatically believes that diversity and data can drive innovation to support the financial futures of millions of everyday workers.

About dailyVest - Founded in 2001, dailyVest is a fintech company focused on helping financial service providers leverage their investor's account data through the use of powerful tools for investment performance and plan health reporting. We combine three elements – core competencies, data and analytics, and digital engagement – into a big data technology platform that enhances a provider's ability to engage and empower their business users and plan participants