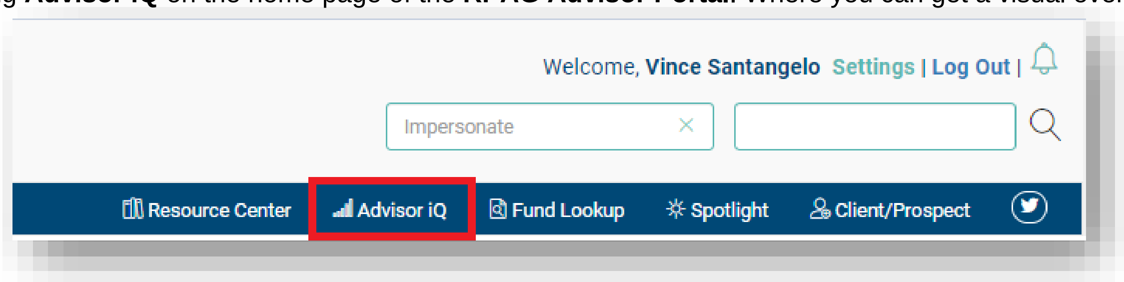
Assets Under Advisement Reporting Data

Partnering with your trusted Asset Manager and Recordkeeping wholesalers is an essential method of focusing your sales and service activities. Wholesalers can assist you with value add resources, thought leadership or marketing efforts. However, wholesalers may not be able to track your mutual AUA or number of plans due to various factors. In the event that you are partnering with a wholesaler and would like to view a list of your mutual clients and/or assets, RPAG's business intelligence dashboard called **Advisor iQ**, can help you quickly export the data.

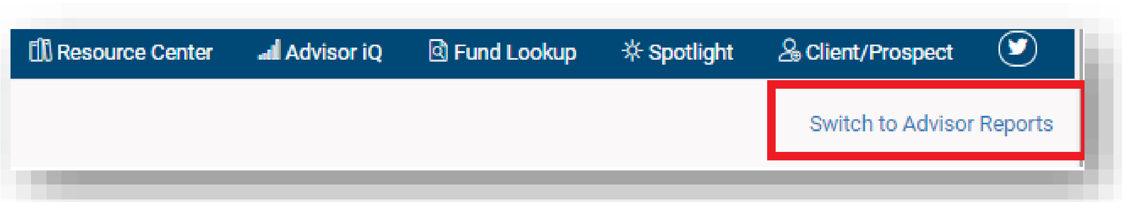
Step 1

Start by clicking **Advisor iQ** on the home page of the **RPAG Advisor Portal**. Where you can get a visual overview



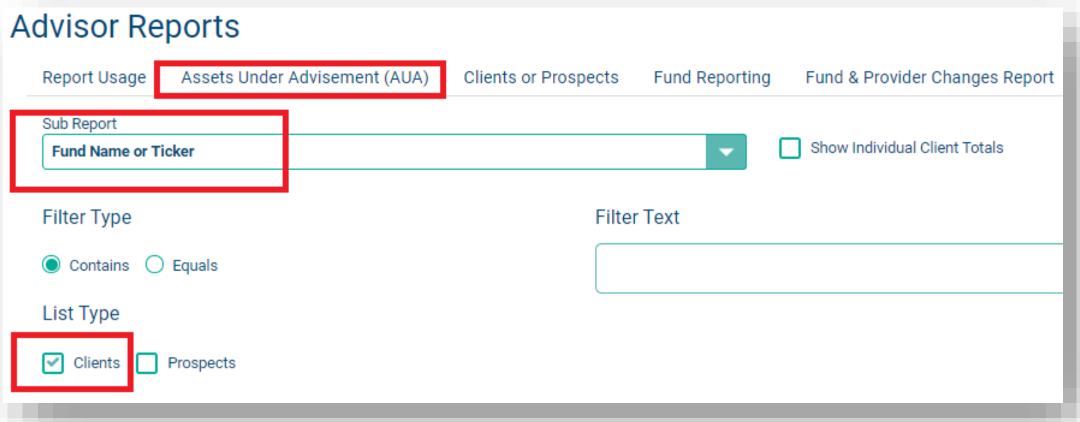
Step 2

Once **in Advisor iQ**, toggle to the **Advisor Reports** in the upper right hand corner.



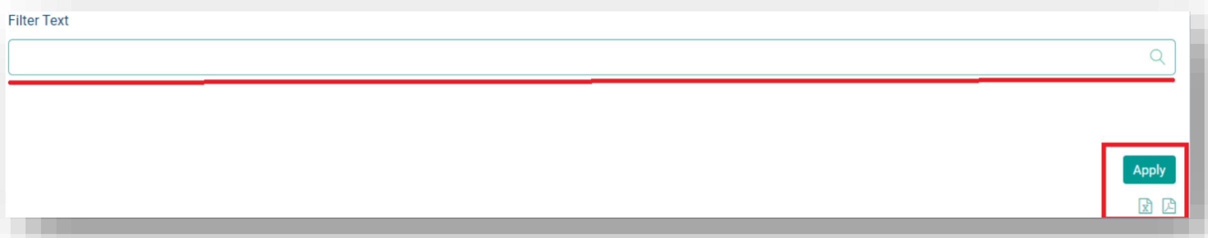
Step 3

In Advisor Reports, select the **Assets Under Advisement (AUA)** tab, select the Fund Name or Ticker sub report, and check Clients in the List Type.



Step 4

Enter the name of the asset manager in the filter text box. Click apply and then you can download report to Excel or PDF by clicking on the appropriate icon.



Step 5

Lastly, you can then decide to share this information with your trusted partner, or use it for your own business intelligence and practice management purposes.

If you need any assistance utilizing Advisor iQ or any of our other business intelligence dashboards, please contact support@rpag.com or call 949-305-3859.