

MPI Target-Date Radar: Quick User Guide

MPI developed Target-Date Radar to create a systematic process to evaluate, screen, and report on TDF products. The process can be outlined in the following three steps:

Step 1: TDF Suitability Questionnaire & Scoring

The suitability questionnaire was designed to create a meaningful interaction between the advisor/consultant and plan sponsor by working together to fill out and understand the plans preferences and demographics as they relate to the selection of the appropriate TDF family for the QDIA.

Step 2: TDF Suitability Overview & Product Selection

This interactive step was designed for internal use by the advisor/consultant to view the entire universe of TDF products and review suitability results alongside additional metrics that are not part of the suitability scoring process (such as returns or expenses). One can select up to four finalists for comparison in the next step.

Step 3: In-depth Reporting of Selected TDF Fund Families

Suitability results are summarized in a consolidated document designed for client consumption. The report can be used to support the initial search/selection process, or to conduct periodic reviews of selected TDFs.

The remainder of this guide is designed to provide a quick walkthrough of the tool's general workflow. Please see the methodology document for additional details on the underlying approach and calculations.

Entering TDF Radar

Within the CFFM FirmPlus tool users can access TDF Radar directly through the Plan Management screen. By clicking on the **My Applications** button at the top right of the screen, you will have an option to select **MPI Tools**. See below:

PLAN NAME	COMPANY NAME	ADVISOR NAME	RECORDKEEPER (PROVIDER)	ASSETS	STATUS	PLAN TYPE
ABC Training 401(k) Plan	My Company	William Advisor	ADP Retirement	\$3,000,000.00	Active	Prospect or Sample
Apple Inc. 401(k) Plan	My Company	William Advisor	John Hancock	\$6,000,000.00	Active	Prospect or Sample

Once you click on this icon you will be seamlessly brought into the MPI TDF Radar application through a single sign-on process.

Once you enter the MPI Tool, click on the **TDF Radar** icon in the top menu (not the report name in the main screen).



From there you can enter a new report name or click on an existing one from the dropdown, then click **OK** to begin the 3 step process outlined below.

Important Note: If you are opening an old report (run with a previous month's returns) you will automatically be sent to the second step of the tool. If you would like to get updated analytics such as Longevity/Volatility/Inflation Assets or Non-traditional asset exposure, you will need to resubmit the questionnaire.

MPI Target-Date Radar: Quick User Guide

Step 1: TDF Suitability Questionnaire

Once you enter a new plan name the decision questionnaire will appear. The main screen provides an overview of the suitability process and users can navigate through the questionnaire using the left navigation or by clicking on the next button at the bottom of the screen.

After a user completes the questionnaire and clicks submit, Target-Date Radar uses the information to automatically score the entire universe of TDFs based on the individual responses of each plan. This multi-variable scoring system allows us to determine which TDFs are most suitable for each unique plan. Please note that this is a “live” calculation and could take a few minutes to calculate the results. If the **Submit** button is grayed out and not clickable, you must go back and ensure that all questions have been answered.

Step 2: TDF Suitability Overview & Product Selection

Next is an interactive dashboard where users of TDF Radar can compare and contrast TDF families. You can review suitability results, see how each family scored, view interactive charts and tables for additional analytics, and select the families (up to 4) for the final comparison. The screen is broken out into 3 main areas:

A. Suitability Summary Pane (Top Left)

The results of the questionnaire are displayed here. These also act as filters to narrow down the universe of TDF products you are viewing. Click on an **orange square** to enable a filter.

MPI Target-Date Radar: Quick User Guide

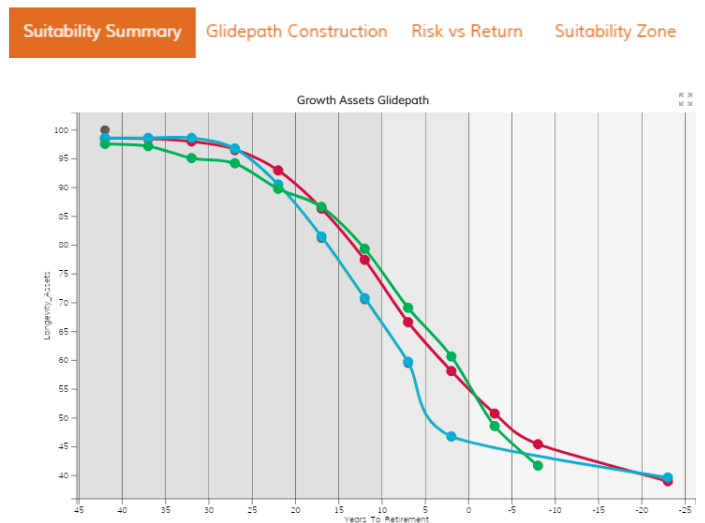
B. Fund Family Scoring & Comparison (Bottom Left)

The total suitability score for each of the TDF families can be viewed here and each family is color coded into two buckets: suitable (green) and less suitable (orange). By clicking on the small **triangle** besides each Strategy Name you can see additional details on how each fund is scored. This is also where you can select the families you'd like to do further analysis on by clicking on the **orange square** beside its name. You can select up to 4 TDFs for the final report.

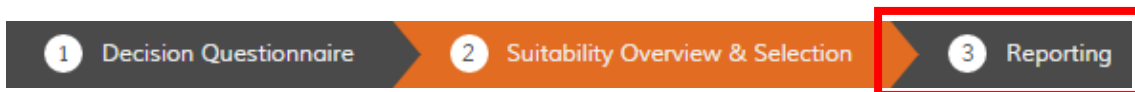
Suitability criteria	Score
Active/Passive	1 / 1
Open vs Proprietary	0 / 1
Non-Trad. Asset exposure	1 / 1
Landing Point	4 / 6
Glide Path Shape	7 / 9

C. Target Date Screener (Right Pane)

The main part of the screen (on the right) shows various charts and tables that can be used to further help with your TDF evaluation. There are multiple views containing different types of analytics. You can click on the **tabs** along the top to see other categories of analytics. You can also select strategies from the views by double-clicking on them in a table, or by selecting them from a chart.



After you have selected your Strategies in step 2, you can now do a more in-depth analysis by clicking on the next step “**3 Reporting**” in the toolbar.



Step 3: In-depth Reporting of Selected TDF Families

The Final Step in the workflow is to create the TDF report. The fund families selected within the previous step are automatically sent to the reporting screen where all underlying vintages are displayed. A user has the ability to easily remove individual vintages or swap share classes as seen below:

MPI Target-Date Radar: Quick User Guide

	Name	Ticker	Begins	Ends	Category	Database
Fund Family: BlackRock LifePath® Smart Beta Series *				Share Class: K		
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2020 K	BIPCX	2007/05	2018/03	Target-Date 2020	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2025 K	BIPDX	2007/05	2018/03	Target-Date 2025	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2030 K	BIPEX	2007/05	2018/03	Target-Date 2030	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2035 K	BIPGX	2007/05	2018/03	Target-Date 2035	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2040 K	BIPHX	2007/05	2018/03	Target-Date 2040	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2045 K	BIPJX	2007/05	2018/03	Target-Date 2045	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2050 K	BIPKX	2007/05	2018/03	Target-Date 2050	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta 2055 K	BIPLX	2013/03	2018/03	Target-Date 2055	Morningstar
<input checked="" type="checkbox"/>	BlackRock LifePath Smart Beta Retr K	BIPBX	2007/05	2018/03	Target-Date Retirement	Morningstar

Once you finalize your share class and vintage selections, you can navigate to the final step by clicking the **next** button at the bottom or by selecting **Review & Adjust** on the left navigation. The final screen in the tool allows users to make certain selections prior to generating the final report output.

Report Page Selection - On the Review & Adjust screen, users have the ability to enable or disable specific report sections. In addition, you can also reorder report sections using the up and down arrows. *Certain sections may be required by the UBS home office and, in such cases, the check box will be selected and grayed out indicating that this is a required section.*

<input checked="" type="checkbox"/>	Cover
<input checked="" type="checkbox"/>	TOC
<input checked="" type="checkbox"/>	Suitability
<input checked="" type="checkbox"/>	Portfolio Details Summary
<input type="checkbox"/>	Expense Comparison
<input type="checkbox"/>	Annualized Returns

Report Variables - At the bottom of the Review & Adjust section is the report variables area. You can change the benchmark series used throughout the report, put an advisors name on the cover page, assign values for specific vintages to do a more thorough analysis, etc.

Benchmark Selection
 Index Series:

Prepared By
 Advisor Name:



Target Date Vintages for Further Analysis


1st Target Date:


2nd Target Date:

3rd Target Date:

Generating Reports - Finally, you can generate a report by clicking on the **PDF** or **PPT** icons. After the report is generated, you can view it under "View Result" or in the "Repository" located in the top menu. *These reports can take several minutes to run. During that time users can either create new reports or log-out of the system.*

Generate  

View result 

 Repository