

A MODERN APPROACH TO TARGET DATE FUND ANALYTICS: TDF IQ

Get the same level of insight once reserved for mega plans. Target Date Fund IQ brings workforce-aligned TDF evaluation to every plan: analyzing demographics, goals, and behaviors with precision.

TDFs aren't created equal, but they're often treated that way.

Even the most carefully chosen target date fund can miss the mark when workforce demographics, savings behaviors, or goals shift. Without workforce-specific analysis, a plan's misalignment can cost performance and engagement.

Target Date Fund IQ, a next-gen TDF analysis with your plan in mind.



Demographic-Weighted Scoring

Factoring ages, savings, balances, and behaviors provides a more detailed alignment of the target date suite and the plan's participants.



Retirement Income Score

Nestimate's proprietary outcomes-focused lens equips fiduciaries to analyze both traditional and income TDFs.



Plan-Centric Fit

Prioritize fiduciary implementation and plan-specific information to provide an enhanced analysis in tandem with risk/returns metrics.



Clean Reporting

Clean, intuitive reporting enables delivery of robust TDF analysis with clarity and simplicity.



LEARN MORE

To learn more or request a customized report, call your DC Solutions representative at (877) 275-9786.

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