

2013 GOLD MONITOR AWARD WINNERS



RETIREMENT PLAN

ABOUT CORPORATE INSIGHT

Corporate Insight provides competitive intelligence and user experience research to the nation's leading financial institutions. For over 20 years, the firm has tracked technological developments in the financial services industry, identifying best practices in online banking and investing, online insurance, mobile finance, active trading platforms, social media and other emerging areas. There are no assumptions in Corporate Insight's work – we use live accounts at all of the firms we research, providing our clients with unparalleled, unbiased intelligence on the competition.

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CATEGORY OVERVIEW

1. Private Homepage
2. Educational Resources
3. Statements
4. Retirement Planners
5. Performance Reporting
6. Rich Media



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Corporate Insight is happy to assist all Gold Monitor Award winning firms in promoting their honors. For more information and to see examples of past promotions, contact us at PR@Corporateinsight.com.

PRIVATE HOMEPAGE

The T. Rowe Price homepage features a clean homepage equipped with two retirement projections and a range of account data. Participants are presented with a table that features five intra-page tabs that list account data, balances, holdings, account history and outside account information. The page excels at archiving account data. Additionally, the firm uses effective shading and borders to successfully organize content on the page.



EDUCATIONAL RESOURCES

Fidelity received a Gold Monitor Award for its excellent Library, a resource center that houses the firm's streaming multimedia, presentations, commentaries and newsletters. The firm provides an ever-increasing number of educational modules on key investing topics, including retirement planning, budgeting, debt management and personal finance, among other options. The Library incorporates an effective range of content-types, all of which are very well-organized.



STATEMENTS

Principal was awarded a Gold Monitor for an excellent quarterly statement. This is primarily a result of the high level of account detail, including an asset allocation chart and a legend that defines the risk associated with investment options and holdings. The statement is also well-organized and easy to follow, featuring clearly distinguished sections and an extremely colorful design.



RETIREMENT PLANNERS

Fidelity earned a Gold Monitor Award for offering multiple retirement planners that provide detailed results and actionable suggestions. The firm's three planners import account data and allow participants to print out or save results. The firm's planners also feature an estimated time that can be expected to be spent completing the tools, a helpful feature given the number of steps and detailed personal data required to complete some retirement planners.



PERFORMANCE REPORTING

Vanguard received a Gold Monitor Award for offering a strong seven-year archive of contributions, earnings, exchanges, loans withdrawals and other transaction histories, which participants can arrange by fund name, transaction description or date. The firm successfully organizes content and allows participants to filter account history by source, fund or both. Finally, the data download option allows participants to export up to 18 months of account history to Quicken, Money or CSV files.



Vanguard®

RICH MEDIA

Vanguard won a Gold Monitor Award for presenting an excellent range of rich media resources on a variety of topics. Materials are well-organized and are available on a range of topics. Additionally, the firm excelled in its offerings of numerous sharing features, which are clearly labeled and readily accessible.





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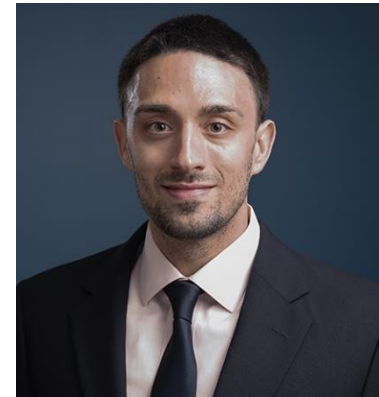
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