

Trustmont RolloverAnalyzer Quick Start Guide

Step 1: Log into the Compliance Platform and RolloverAnalyzer.

Step 2: Engage your client on:

- Service
- Fit
- Cost comparisons

Step 3: Review your analysis.

Step 4: Disclose and document your Recommendation.

Login

<https://rolloveranalyzer.investorcom.com/rolloveranalyzer>

- Your username is your email address
- First Time Users, Click First Time User, set up your password and then login again.
- [RolloverAnalyzer Video](#)
- [RolloverAnalyzer User Guide](#)

Password for User Guide -
complianceplatform