

InvestorCOM Launches the New RolloverAnalyzer to Enhance Compliance and Drive Rollover Asset Growth

Delivers expanded capabilities that empower advisors to efficiently assess, document, and support rollover recommendations with greater accuracy and confidence.

BRANTFORD, ONTARIO, CANADA, April 16, 2025 /EINPresswire.com/ -- InvestorCOM, a leading provider of regulatory compliance software for wealth and asset managers, is proud to announce the release of the New

[RolloverAnalyzer](#)™, the next-generation solution designed to help financial professionals meet the regulatory requirements of Regulation Best Interest (Reg BI) and PTE 2020-02 while enhancing the efficiency and growth of rollover transactions.

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*David Reeve, CEO,
InvestorCOM*

Building on the success of its predecessor, the New RolloverAnalyzer delivers expanded capabilities that empower advisors to efficiently [assess, document, and support rollover recommendations](#) with greater accuracy and confidence. With over 30,000 users on InvestorCOM's compliance platform, the latest enhancements to the new RolloverAnalyzer will enable advisors to maximize this opportunity while ensuring full compliance with regulatory requirements.

Key Enhancements of the New RolloverAnalyzer:

- Enhanced UI, Customization and Analysis: A refined advisor experience for rollovers based on a Best Interest score driven by customizable service, fit, and plan cost criteria. Bringing clarity, consistency, and efficiency to rollover recommendations.
- Intelligent Automation: Streamlined documentation and oversight to reduce compliance burden



while improving efficiency.

- Facilitating Growth Through Consolidating Accounts: Advisors can now create a rollover from multiple sources, enabling a more efficient and scalable approach to rollover asset growth.
- Compliance via Documentation and Dashboards: Built-in compliance features provide secure, automated documentation, record-keeping and reporting, ensuring regulatory readiness and auditability.

"We are very excited to be releasing the New RolloverAnalyzer, primarily because it represents our client's evolving requirements," said David Reeve, CEO of InvestorCOM. "The retirement industry presents a significant opportunity for wealth management, and the 401(k)-to-IRA rollover market alone is approaching \$1 trillion in assets annually. We now have over 30,000 satisfied users on our platform, and these new capabilities will further increase the value we deliver to our partners. We are also thrilled to see the organic growth of rollover assets for our clients – on average, our clients are realizing 30% organic asset growth in rollover volumes and assets due to the efficiency of the New RolloverAnalyzer."

Firms using the New RolloverAnalyzer have already experienced significant improvements in both compliance readiness and business outcomes.

InvestorCOM's New RolloverAnalyzer has been a game-changer for our firm," said Rick Ohlrich, CCO RFG Advisory. "Not only has it simplified our compliance process, but it has also allowed us to increase our rollover business by leveraging simple process and data-driven insights. The new enhancements provide even greater value, ensuring we are well-positioned to meet our regulatory obligations while maximizing client outcomes."

InvestorCOM remains committed to delivering best-in-class regulatory compliance solutions that align with industry trends and evolving client needs.

For more information about the New RolloverAnalyzer, visit investorcom.com/demo.

About InvestorCOM

InvestorCOM is a leading provider of regulatory compliance software and communications solutions for wealth and asset managers. Our innovative technology suite supports the principles set out by regulators, enabling firms to meet compliance requirements while improving client outcomes. InvestorCOM's platform is trusted by thousands of advisors and firms to navigate the evolving regulatory landscape with confidence.

Ankit Bhatia

InvestorCOM Inc

abhatia@investorcom.com

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