Practice-building strategy:
Winning just two plans a year
can add up over time

Take steps toward a more profitable practice

Retirement plan business can attract additional assets. Plan participants tend to leave their money in their accounts while continuing to invest through automatic payroll deduction – even during volatile markets. Retirement plans can also serve as gateways to new wealth management business since each plan participant may have additional needs, such as 529 accounts and IRAs, as well as eventual rollovers and retirement income planning.

Many successful financial professionals have discovered the potential benefits of a practice that includes both retirement plans and retail business. You can, too, and it's easier than you might think. You don't need to be an expert in retirement plans – just an expert in managing the relationship with your clients.

Try a measured approach – as the hypothetical example below demonstrates, winning just two small plans a year can make a big difference to your overall practice.

Assume that each year over the next decade you earn one existing (takeover) 401(k) plan and one startup plan.

Ready to get started? We're here to support you. For help building or strengthening your retirement plan practice, call us at **(800) 421-9900**.

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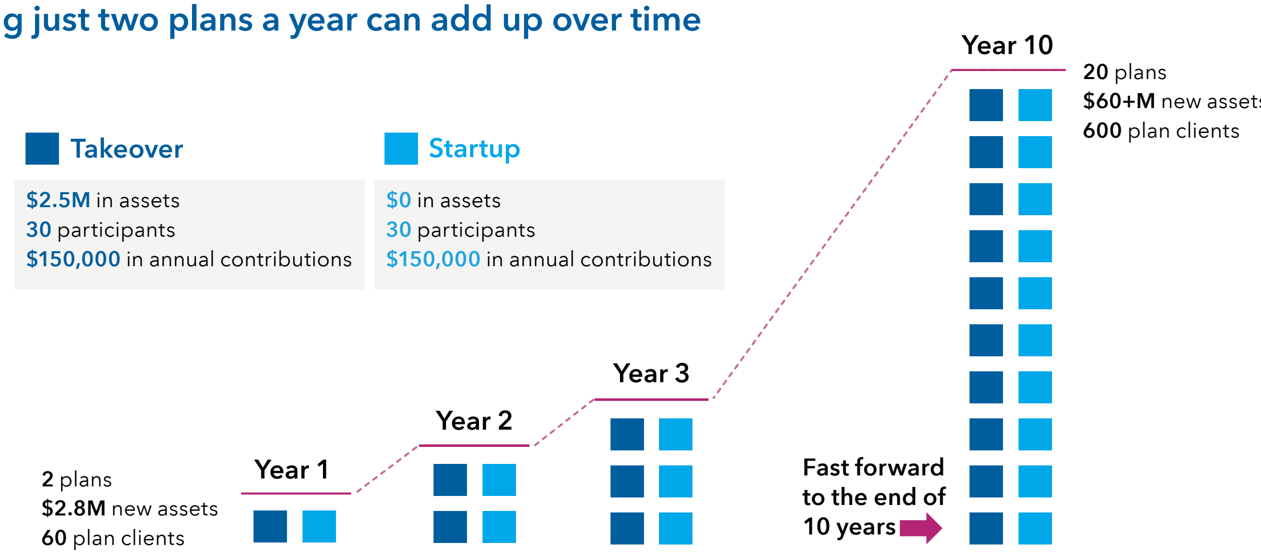

For illustrative purposes only. Not intended to portray an actual investment. Assumes 8% average annual asset growth, a $2.5 million asset transfer from a takeover plan each year, and $150,000 in new annual plan contributions from both plans every year.

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