Successful 401(k) Marketing

A Workshop For Financial Advisors

Outline

- **The 401(k) Business Opportunity**
  Why the time is right for building a 401(k) practice
- **Six Things I Hate About 401(k) Marketing**
  Don't just survive them. Turn them into benefits
- **Build Your 401(k) Business Plan**
  Maximize revenues per sale
- **Leveling the Playing Field**
  Compete with the established 401(k) specialists in your market
- **Why Should They Hire YOU?**
  Build the 6-step value proposition that wins business
- **What Are Plan Sponsors Looking For?**
  It's not cheaper fees
- **Focused Prospecting**
  Identify prospects with the highest potential
- **Building the Prospect Pipeline**
  12 common sources of 401(k) referrals
- **The Sales Process**
  From first contact to closing the deal
- **Don't Reinvent the Wheel**
  Tools that will leverage your time and service delivery
- **Take It to the Next Level**
  Best practices of top 401(k) advisors

Focus

***Successful 401(k) Marketing* teaches financial advisors the keys to creating successful 401(k) business.**

What You'll Learn

√ **Prospecting techniques that work.**
√ **Best practices used by the 401(k) industry's top advisors.**
√ **How to compete and win against experienced 401(k) specialists.**
√ **Steps to maximizing 401(k) revenue.**

Who Should Participate?

Successful 401(k) Marketing is specifically designed for financial advisors who want to expand into 401(k) sales and those who are ready to take their retirement plan practice to the next level.

Seminar Format

The workshop runs from two to three hours and is designed to be highly interactive. *Successful 401(k) Marketing* includes a workbook that will actively engage participants in turning these insights into deliverable action plans.

Practical Insights from a Seasoned Veteran

W. Michael Montgomery, AIF, CLU, CFS has designed, implemented and serviced hundreds of 401(k) plans over the last three decades. After serving a prominent role with several of the 401(k) industry's leading providers, he formed an independent advisory practice to work directly with plan sponsors. Mike continues to be actively involved in retirement plan marketing as owner of Montgomery 401(k) Advisors and as a principal of Investech Retirement Services. His seminars draw from the market-tested practices that have brought success to him and other top 401(k) advisors.

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