14 online video segments — 7-step process

PLUS 25 E-TOOLS THAT FINANCIAL ADVISERS CAN USE TO OPTIMIZE THEIR 401(K) SALES OPPORTUNITIES

NIPA National Institute of Pension Administrators

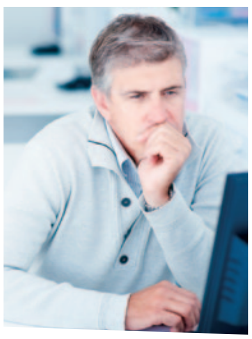
Advancing the Business of Pension Administration

online, anytime,
on any web-enabled device

401(k) Sales Champion Workshop

grow plan referrals from financial advisers by providing them with professional development

The 401(k) Sales Champion Workshop consists of 14 online video segments describing a 7-Step process that financial advisers can follow to optimize their 401(k) sales opportunities. As they do, they build a stronger relationship with your company. Additionally, the workshop provides them with 25 E-Tools they can access and use to improve 401(k) sales and service efforts. And when they have a question or comment, they simply hit the “Contact Your Coach” button to be connected with your company representative and KnowHow 401(k).



grow plan referrals and strengthen your relationships with financial advisers

… who are beginning their 401(k) business

… or “re-starting” their 401(k) business

…and 401(k) Sales Champions responsible for the sales and service training of members of their team

Your Firm’s Brand Highlighted

throughout the online program and on hard copy materials, providing financial advisers a long-term reminder of your firm’s commitment to their professional growth.

CONTINUOUS TRAINING

The workshop has been designed to be a financial adviser’s first and ongoing resource as they develop their 401(k) business. As they experience the “realities” of the 401(k) marketplace, they will return to the workshop to the appropriate material for perspective on how to proceed. And when they return, they are reminded of your firm’s investment in their professional development.

LICENSING

Licensing The 401(k) Sales Champion Workshop can provide your organization with an exclusive or select geographic territory allowing online access of the workshop for financial advisers. The license includes a custom group presentation that you or your Business Development team can deliver along with customized copies of the 401(k) Sales Champion Workshop Profiling Menu to hand to your workshop users at group meetings.

Exclusive or select geographic licenses available

LICENSING INCLUDES

- Exclusive or select geographic territory, allowing online access to the workshop for thirty-five (35) users
- Custom home page for your firm
- 100 custom copies of the 401(k) Sales Champion Workshop© Profiling Menu
- A custom group summary presentation of the workshop for branch office / group meeting use
- Contact Your Coach button for instant access to your firm’s contact and KnowHow 401(k)’s Chris Barlow
- Download activity reports to measure financial adviser usage; opportunities for partnering
- Ongoing support by KnowHow 401(k) (one-on-one business plan development, group web cast or conference call)
- Annual updates to content, usability and technology

401(k) Sales Champion Workshop

A unique, cost effective, memorable and valuable way to grow referrals from financial advisers and strengthen your relationships with them. Call Chris Barlow at KnowHow 401(k) today!

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