

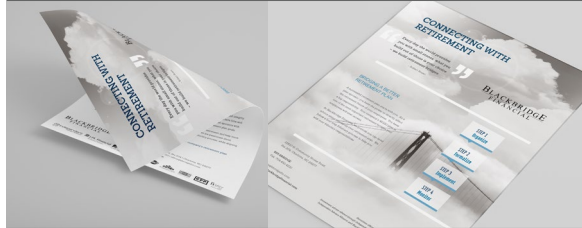
PROFESSIONAL BRANDING PACKAGE

For your professional retirement plan practice



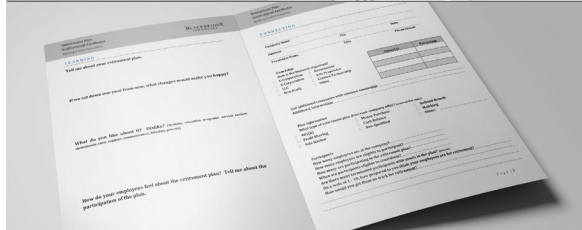
PLAN SPONSOR BROCHURE

A professional eight page brochure to share with plan sponsors, HR Executives, CFOs, CEOs, Controllers, Presidents, Owners of Companies, and other influential retirement plan decision makers. The copy, graphics, and images are intended to convey understanding, experience, and to build trust that you and your office are professional retirement plan advisors.



OVERVIEW

Two page overview for plan sponsors, HR Executives, CFOs, CEOs, Controllers, Presidents, Owners of Companies, and other influential retirement plan decision makers about how you will support both the plan and the participants. Also, a great resource to share with Centers of Influence to show expertise.



INSTITUTIONAL FACTFINDER

A four page questionnaire to gather the pertinent retirement plan information, so that your office can research, analyze, and then share the findings/results with decision-makers.



INSTITUTIONAL SERVICE CALENDAR

A four page brochure describing your plan-level and participant-level services throughout the quarter, at annual meetings, and on-going support.



PITCHDECK

A professional PPT to present your capabilities at finalist presentations. Within the PPT deck, it will address how you service your retirement plan clients, as well as, the education you provide to plan participants. Throughout the presentation, you demonstrate your strengths and the reason why prospects should select you as their retirement plan advisors.

Evaluate your brand and stand out from the competition
www.401k-marketing.com | info@401k-marketing.com | (860) 933 - 0859



We live in a visual world and when you give your brochure to your customer, you are placing your company's identity in their hands. Quality marketing has the power to elevate your brand and immediately establish you as a trusted industry professional.

Throughout your experience with 401(k) Marketing, we will ask you questions and listen to learn your unique value proposition. We are a full-service agency and we will write, edit, and design your material from start-to-finish.

With over 10 years of industry experience, we understand this business because it is our business. Your new marketing materials will include professional copy, copy-editing, and gorgeous design. The goal is to support your retirement plan practice with quality branded material that lasts for years and that you and your clients are proud to share with their clients, prospects, and trusted industry peers.

Thank you again for your partnership and hope you enjoy!

For additional branding services or for more deliverables, please contact us directly for a pricing quote. We are excited to partner with you to create your brand story.

401(k) Marketing

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We market retirement plan advisors and third party administrators.

401k Marketing, LLC is not in the business of providing legal advice with respect to ERISA or any other applicable law. The materials and information do not constitute, and should not be relied upon as, legal advice. The materials are general in nature and intended for informational purposes only.

All content, including any brochures or other materials designed for potential use with plan sponsors, fiduciaries, and plan participants, must be reviewed and approved by the compliance and legal department(s) of the Financial Professional and/or Third Party Administrators firm prior to any use to confirm that they meet the firm's legal and compliance policies and standards. The Financial Professional, Third Party Administrator, and his/her firm are solely responsible for the use of content and any materials included herein, and for ensuring that all services provided by the Financial Professional and Third Party Administrators conform to the firm's legal and compliance policies and standards.

