RETIREMENT PLAN MARKETING

Powered by 401(k) Marketing™

COMPLIANCE SUBMISSION PROCESS

By choosing Retirement Plan Marketing (RPM), you have taken the first step in becoming your community's known and trusted advisor. Your new marketing materials have been professionally designed and written to convey your industry knowledge, peak your prospects' interest, and make your compliance team smile.

We believe that compliance review improves the final product. We strive to make your compliance review process simple and effective. Your marketing materials are editable to include your disclosures and requested edits. Simply follow the steps below:

1. CUSTOMIZE
2. SUBMIT TO COMPLIANCE
3. MAKE REVISIONS
4. FINAL SUBMISSION

CUSTOMIZE

Make your new marketing materials YOUR OWN. It's easy!

1. Open editable PDFs using Adobe Acrobat.
2. Click on the Edit PDF tool in the right pane.
3. Customize Company Logo, Contact Information + Disclosures.
4. Save the changes.

If at any point you feel your materials need additional pizzazz, talk to us about our GROW option with Custom Branded RPM!

SUBMIT TO COMPLAINCE

Here are brief descriptions of each of your marketing pieces and helpful tips for distribution– which may come in handy for compliance submissions.

QUARTERLY NEWSLETTERS

Quarterly newsletters demonstrate your knowledge within the retirement plan marketplace. The articles can be utilized on multiple marketing mediums. You may choose to publish this piece on social media and/or your website. You may also choose to deliver it to prospects and clients via email or as a printed piece.

- Approximately 1250 words

INFOGRAPHIC + GUIDE

Information graphic with industry relevant statistics, facts and figures for plan participants and a guide for plan sponsors. We source and cite all information for easy reference. You may choose to publish this piece on social media and/or your website. You may also choose to deliver it to prospects and clients via email or as a printed piece.

- Approximately 2 pages

DIRECT MAILER

Custom direct mail postcard for plan sponsors and members of retirement plan committees. If you are not interested in sending direct mail, this piece can also be shared on social media or your website.

- Approximately 5.5 x 7.5"

SOCIAL MEDIA POSTS

Every week, you will receive relevant and topical curated news articles to post via social media. We include a short reason why the listening community should click on the article (ex. Great article about ROTH 401k limits, check it out.) You may choose to post manually or use Hootsuite™ to manage, track, and record posting activities. Ask your compliance team how they prefer to review social media posts.

- Approximately 5 posts per week

VIDEO

Infomative videos will continually deliver education and value to the plan sponsor community. Expertly designed and narrated by our CMO, these videos are great to post on your website and social media platforms.

- Approximately 2:00 minutes

EMAIL TEMPLATES + FOLLOWUPS

Each piece of content will include email templates and followup templates. Templates should be submitted to compliance with corresponding content.

- Approximately 3 – 4 pages

MAKE REVISIONS

After review is complete, your compliance team may come back with an edit or comment – that's OK! Simply edit the PDF.

1. Open editable PDFs using [Adobe Acrobat.]
2. Click on the Edit PDF tool in the right pane.
3. Make revisions.
4. Save the changes.

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FINAL SUBMISSION

Once you get the final thumbs up from your compliance team, you are ready to begin sharing your new content with your prospect community! We have provided a step-by-step editorial calendar to help you stay organized and on-track as you promote your business.

Remember: **Marketing is a journey, enjoy the ride!**

STREAMLINE AND PROFESSIONALIZE YOUR RETIREMENT PLAN MARKETING

HOW IT WORKS

SIGN UP

SUBMIT to compliance

FOLLOW the calendar

INCREASE your book of 401(k) business

(k) RETIREMENT PLAN MARKETING

Powered by 401(k) Marketing™

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