RIC LAGER
MASTER CLASS

AGENDA

Summary

From technical analysis and messaging to LinkedIn® and getting prospects in the door, this Master Class will guide you to building your own individual 401(k) advice business.

THE BIG PICTURE

February 9, 2023

This 3-hour course will not only get you fired up about getting your 401(k)-advice business going, but we'll even help you take the first steps.

We will provide a step-by-step guide for client and prospect 401(k) advice marketing, development, and maintenance of this niche investment advisory business.

Once you have the foundation, we'll get you started on the client 401(k) Find the Money Campaign. This will help you expand your client relationships to include 401(k) advice for your client household's current and past 401(k)s.

Over the full year, you will get everything Ric spent years gathering and learning to run a successful 401(k) advice business. This will include all the client and prospect marketing materials, resource links, and supporting presentation slides.

We will take all that information and break it down into monthly calls. You will leave these hour-long calls with a mastery of the knowledge and tools to fully implement this niche business.

Session Date	Details
March 9, 2023	**Session One: The Rules for Tactical Management** You can manage the 401(k) holdings in whatever tactical method you currently follow. If you don't have a current method, we'll give you some ideas of what you could use to develop a clear method, because managing 401(k) assets will require a clear method. You must have compliant rules, tracking, and reporting to make this work.
April 13, 2023	**Session Two: Communicating Your Value** To make this work, you need to have a clear, 401(k) Expert brand. It takes certain wording in the right places to develop that brand. Ric will share with you his past marketing materials to spur ideas for what your materials will look like. You will leave this class with some ideas for wording and what channels to use to place that wording.
May 11, 2023	**Session Three: Everything LinkedIn – Part I** There is a lot you can do with LinkedIn. Ric has mastered the various tools and capabilities on that platform. You will learn to develop your LinkedIn profile, company page, showcase page, LinkedIn group, and LinkedIn Newsletter. In this first part, Ric will show you all the tools he has developed and we'll help you develop yours.

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June 8, 2023	**Session Four: Everything LinkedIn – Part II** In this second session, Ric will help you craft your messages and what you'll do to use these tools. Of course, it is easier to re-write than it is to write. You will get all of Ric's wording so you can make the tweaks and adjustments to fit the brand you have developed.w
July 13, 2023	**Session Five: Finding Leads – Company List Sourcing** What you may not have known, is you began this session while still in our opening course. You see, it all starts with building into particular companies. That will start with introductions from clients. Ric will show you the great resources that will help you gather all the information you need before you sit down with anyone. In this call, Ric will discuss how to go about gathering a list of other potential clients at each company. He'll also show you how to gather the necessary data that will make your job in closing meetings all that much easier.

Session Date	Details
August 10, 2023	**Session Six: Unique Individual List-Building Tools** In this session, Ric will introduce you to Sam Richter. Sam will then take you through, in real-time, how to build out lists of potential individuals, with contact information at your target companies. Trust us, working with an expert like Sam for an hour will blow your mind.
September 14, 2023	**Session Seven: Getting Prospects in the Door** Ok, you may have started the ball rolling with existing clients, but it's a different process for prospects. Ric will show you how to take those names you've gathered using the tools discussed in the previous session and get them into the office. There is a set process. There is a set script. Follow these suggestions and you will get people in to see you. And, of course, Ric will give you all the scripts, email messaging, video scripts, connection wording, etc. you need to get started now.

Session Date	Details
October 12, 2023	**Session Eight: Getting Referrals and Introductions from Prospects** One of the more powerful prospecting tools, no matter what business you do, is introductions and referrals. In this session, Ric and Matt will go through your whole referral and introduction process. They will help you with the right words to say, communication to send, and the timing of it all to get referrals and introductions to other potential 401(k) advice clients. This is a critical step to creating a sustainable 401(k) advice business. Each new employee at the same company that becomes a client creates opportunity and efficiency of scale.
November 9, 2023	**Session Nine: The Cost of the Problem** They say in sales there is no such thing as a magic bullet. Well, in this case, there is something that is pretty darn close. Ric will go through the presentation that gets most of the people who sit in front of you to sign the paperwork.

Session Date	Details
December 14, 2023	**Session Ten: Setting Expectations and Delivery** As you bring in new clients, you want them to be raving fans. We will walk you through what it takes to manage the 401(k) accounts. We will help you craft your message plan, so your clients know and see value in the cost of the service they are getting. This will include a company-specific newsletter that will support your referrals and introductions.