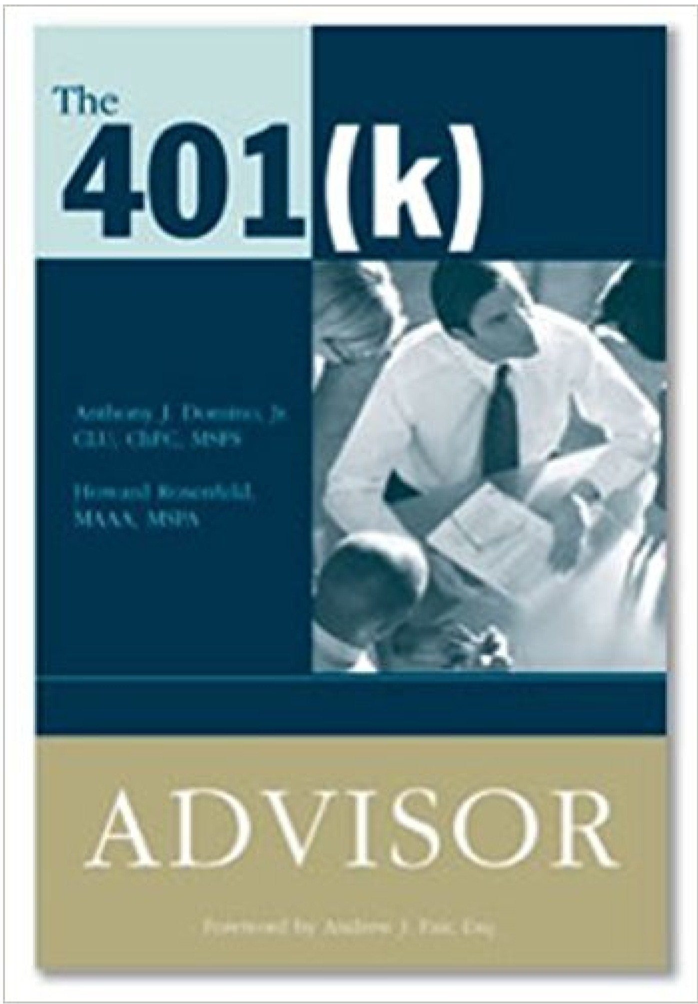
The 401(k) Advisor



Synopsis

Everything you need to establish or increase your presence in the massive 401(k) market. Using their combined expertise, employee benefits specialist Anthony J. Domino, Jr., CLU, ChFC, MSFS, Immediate Past President of the Society of FSP and Enrolled Actuary Howard Rosenfeld, MAAA, MSPA, have created the first 401(k) book designed specifically for producers. In today's business environment, you need more than just technical references. You need a tool that shows you step-by-step how to offer your business clients the most popular retirement plan in the United States. The 401(k) Advisor is user-friendly enough for advisors new to the 401(k) market, yet accurate and authoritative enough to satisfy the needs of longtime experts. From design features to sales ideas, this book provides everything you need to establish or increase a presence in the 401(k) market. After reading The 401(k)Advisor, you will be able to: Identify the best candidates for new 401(k) plans so you can focus on the business most likely to pay off, and make proposals that are most likely to win new business Easily prepare a sales presentation that will consistently bring in new 401(k) business Explain the new Roth 401(k) feature that takes effect January 1, 2006 Win the business of existing plans by demonstrating how you can improve on the costs or services of their current 401(k) provider Pinpoint the critical compliance issues and show the client how to satisfy them Answer practical, ongoing 401(k) questions easily, proving your expertise on retirement plans and opening the door to other opportunities with small business owners Take advantage of the growth market in solo 401(k)plans Features: Explanation of how to present and sell a 401(k) plan to an employer Explanation of key requirements for plan compliance Checklists and information-gathering forms Explanation of fee arrangements: bundled, unbundled and open architecture User-friendly answers to the most important plan qualification requirements Operational issues Sample forms and documents With 401(k) expertise, you can establish your credibility and earn the trust of business owners who have a multitude of other life insurance needs.

Book Information

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