

Module 1 Lesson 1



INSTANT **AUTHORITY**

HOW TO POSITION YOURSELF AS

A 401K SPECIALIST

MODULE 1

GETTING STARTED



MODULE 1
GETTING STARTED

LESSON 1
What to Expect



You are
raising the stakes
and the standards...

At the end of this course, you will have...

- UVP – Unique Value Platform
- A Valuable Process
- A Professional Brand
- Professional Sales Collateral
- Content to Publish





Some things
to keep in
mind...



TAKE ACTION

- Take time to go through each lesson and exercise
- Work at your own pace
 - Don't skip



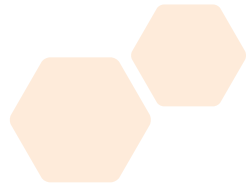
AVOID

- I already know this...
- It won't work for me because...
- Working in a bubble



REMEMBER

- Go easy on yourself
- Know this can help your business grow



With positioning, comes
opportunity...

Module 1 Lesson 2




MODULE 1
GETTING STARTED

LESSON 2

**Why Positioning
is Important**



Every opportunity will
involve a Google search of
your personal brand...

A decorative graphic consisting of several hexagons. At the top left, two small white hexagons with black outlines are positioned. Below them, a larger, solid dark blue hexagon is partially overlapping a larger, white hexagon with a dark blue outline. The white hexagon is positioned to the right and slightly below the dark blue one. The entire graphic is set against a white background.

Nearly 40% of investors said they had a significantly more positive impression of advisors who have a good website.¹ That number was higher for Gen XYZ investors at 54%.²

The more plan sponsors can learn about you as a person – and as a professional – the shorter the distance between a prospect and a client



The first impression
can also be the last
impression you give if
you're not positioned
properly





You're generally NOT
the only advisor a plan
sponsor is
considering...



Your online presence
needs to match your
pitch...

If there's no mention of
401k Plan Management
on your website - you
need to fix that



It's not just about your expertise...

People want to do business with people they like and trust so you can't be all business online

There's nothing more valuable to you in terms of your effort than to have online positioning as a 401k specialist



Ripple Effects





Jean Chatzky

Dean
Graziosi



Suze Orman

David Bach





Doran Cafaro



Charlie
Epstein



Don Settina



Mario
Giganti



When you're seen as an influencer, expert, educator, speaker, authority – you have a huge advantage over anyone else you're competing against.



You have...

- More influence
- You win more business
- You don't have to compete on price



You have...

- People listen when you talk
- More opportunities come your way



Opportunities...

- Grow your list faster
- Network with other advisors and share resources
- Get seen by media and get media appearances



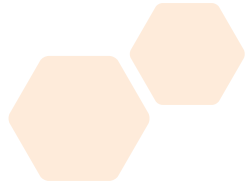
Opportunities...

- Get interviews on podcasts
- Guest column opportunities for trade publications
- Speaking opportunities





Being positioned as a 401k specialist is like a force multiplier that makes it easier for you to compete



Now it's your turn...



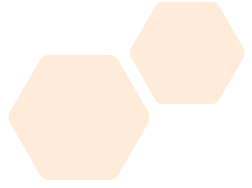
Go to your workbook



Take some time to think about WHY you want to be seen as a 401k specialist



What do you hope having online positioning does for you and your business?



REFERENCES

1. The 2016 Fidelity Investor Insights Study
2. The 2019 Fidelity Investor Insights Study.

Module 1 Lesson 3

The background features several light gray hexagonal shapes of varying sizes and orientations. One large hexagon on the left contains the text 'MODULE 1' and 'GETTING STARTED'. Another large hexagon is positioned to its right. A smaller hexagon is at the top, and a white-outlined hexagon is at the bottom.

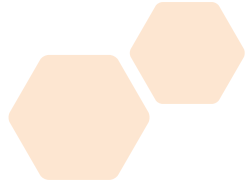
MODULE 1
GETTING STARTED

LESSON 3

**The 4
Core Fundamentals
of Great Positioning**



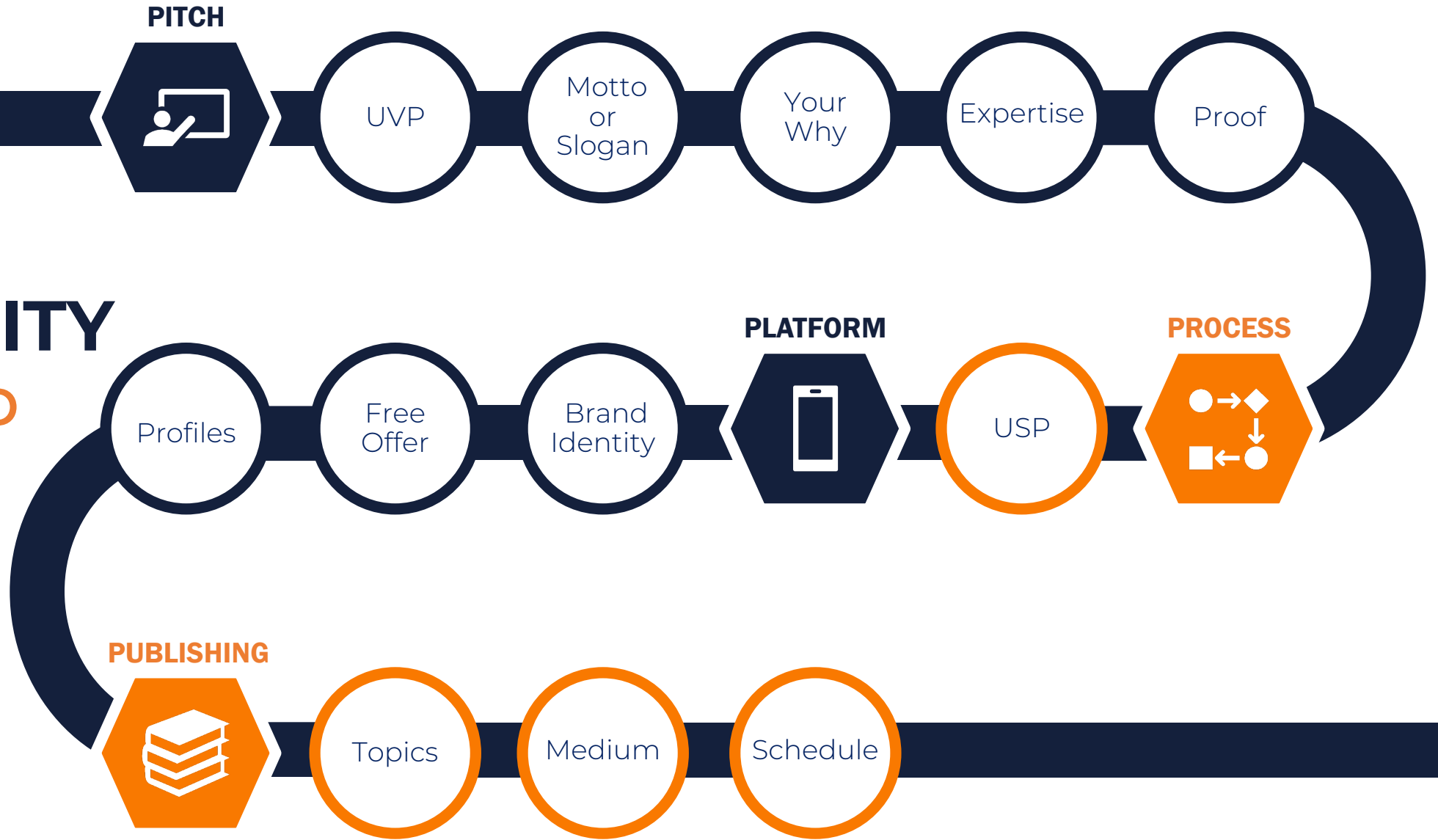
In a competitive market,
it's the well positioned
brands that stand out...



4 Core Fundamentals of Great Positioning



INSTANT AUTHORITY Roadmap



How to Position
Yourself Online as
a 401k Specialist

It's easier than you think

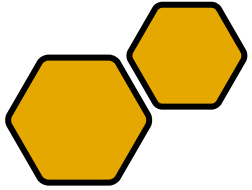
- In each lesson I'll cover the high-level strategies
- I'll show you the specific tactics to create your own positioning and you can watch me as I demonstrate exactly what I'm teaching you to do



It's easier than you think

- We'll look at some case studies and examples to give you more ideas and inspiration
- Then you'll have a chance to dive in and create your own online positioning, one small step at a time as we go through the program





One final thing...





Complete the Authority-Trust-Credibility Survey



Answer 20 questions



Get your ATC scorecard