

PITCHBOOK PRO

7 Ways to Get INSTANT AUTHORITY

401K

Hi!

WELCOME TO THE TRAINING

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401  BESTPRACTICES.COM



7 Ways to Get Instant Authority

1. Get a Credential
2. Publish
3. Create a Professional Brand
4. Join Industry Associations
5. Speak in Public
6. Share Your Story
7. Formalize Your Service Model

1. Get a Credential

- Professional Plan Consultant (fi360) (4.5 hrs / \$894)
- Accredited Investment Fiduciary (fi360) (8 hrs / \$1970)
- Certified Plan Financial Advisor (NAPA) (10 hrs / \$1025)

2. Publish

- Sets you up as the expert and educator
- Publish articles on your blog and LinkedIn
- Submit articles to BenefitsLink.com
- Shoot short (< 5 minute) videos with tips or definitions for Plan Sponsors and publish to YouTube
- Publish a book (*Save America, Save!*)

3. Create a Professional Brand

- Having a consistent, professional brand creates instant credibility
- Choose a color theme
- Choose an image (or 2)
- Create your tagline
- Publish across all social media platforms (LinkedIn, Twitter, YouTube, Your Website, etc.)

4. Join Industry Associations

- Then list your association affiliation in your marketing (LinkedIn, Website, Pitchbook, etc.)
- NAPA – National Association of Plan Advisors
- ARA – American Retirement Association
- PSCA – Plan Sponsor Council of America
- Local SHRM chapter – Society for Human Resource Management

5. Speak in Public

- Host a Lunch and Learn
- Give a Presentation about Industry Trends or the Latest News in Retirement at your local Chamber of Commerce Meeting or Lions Club, etc.
- Submit to speak at HR Event or Meeting (SHRM)

6. Share Your Story

- Why are you in this industry?
- What experiences have you had that make you want to work with Plan Sponsors and Participants?
- What difference do you hope to make for your clients?

7. Formalize Your Service Model

- Don't just offer "investment selection and monitoring support"
 - Offer "The 4-Step Prudent Investment Process"
- Don't just offer "Benchmarking and Fee Analysis"
 - Offer "The Competitive Advantage Assurance Program"
- The services might be the same, but how you organize, package, and explain them can provide an instant credibility boost when sharing your service model

BE THE AUTHORITY

WHICH ONE WILL YOU DO FIRST / NEXT?

If you have any questions, comments, concerns, success stories to share –

contact me at:

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