INCOMECONDUCTOR

Defining a New Growth Strategy for Your Firm

Why Retirement Income?

Firms are on the hunt for new growth strategies and providing specialized retirement income planning services to existing clients and prospects represents a massive opportunity to achieve this goal. The opportunity is defined not only by the $25 Trillion held in retirement assets, but by a broad range of factors:

- **Differentiation & Client Capture**

  The first step to attracting new client assets is standing out from the crowd. Millions of pre-retirees are looking for guidance on income distribution and you need to be seen.

- **Household Consolidation**

  Holistic income planning includes all of a client's assets. Consolidating outside assets can instantly grow AUM with zero cost of client acquisition.

- **Retention & Recruitment**

  Providing the tools that increase advisor efficiency and productivity keeps them engaged with the firm. Being able to then demonstrate their success is a powerful story for attracting talent.

- **Compliance**

  Knowing that both the process and the reporting that your advisors use for income planning exceeds fiduciary standards helps you avoid customer complaints and potential litigation.

Why IncomeConductor?

The IncomeConductor team understands your business and the challenges you face leading it. We have designed a **technology-supported business system** that not only answers the "Why?" but also the "How?".

Sales & Marketing

Draw from a library of FINRA-reviewed collateral to attract, educate, and capture new clients.

Client-Friendly Reporting

Generate clear, simple proposals and review reports that clients love and understand.

Admin Efficiencies

Automate the tracking of income plans to free up more time for sales and service.

Case Support

Let us help your advisors become experts in income distribution, one case at a time.

IncomeConductor is a Complete Business Plan.

We are far more than technology and we've developed an onboarding model for turning teams and field forces into retirement income specialists. New implementations can be established in weeks, not months.

1 Onboarding

- **Strategy Training**
  Explaining the Time-Segmented distribution philosophy to clients
  Sales approaches for conveying advisors' value as a "Plan Manager"
- **Technology Training**
  Building income plans with real case examples
  Linking and tracking investments to provide successful periodic reviews

2 Implementation

- **Customized Sales & Marketing Materials**
  Client videos for use on website and distribution via Social Media
  Brochures and presentations to educate and capture prospects
- **White Label Reporting**
  Customized branding with flexibility to fully modify content/imagery
  Support the establishment of a uniquely identifiable business line

3 Ongoing Support

- **One-on-One Case Support**
  Let our planning pros help your advisors tackle unique client scenarios
- **Expert Content Live & On-Demand**
  Monthly educational webinars with our team and other industry veterans
- **Free Future Upgrades**
  Continuous enhancement of technology at no additional cost

Ready to learn more?
Go to **incomeconductor.com/demo** today to find out how we're helping firms raise billions in new assets.

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