Join us for a National Advisor Online Event

"Growing Retirement Plan Sales in 2021"

to Benefit the Charity of Cru® Inner City

Thursday, April 8, 2021

11:00 a.m. – 12:15 p.m. (EDT)

★1.5 hours of Fi360 CE Credit (AIF Designation)

★1.5 hours NAPA CE Credit

TPA Benchmark℠
Partnerships in Action℠
a service of Hynes Associates

TPAbenchmark.com is a service of Hynes Associates, focused on helping connect Retirement Plan Advisors, Providers and TPAs to write *MORE* business together.

FRANKLIN TEMPLETON INVESTMENTS

Attendance is complimentary; however, TPAbenchmark is conducting this event to benefit Cru® Inner City. You will be given an opportunity to contribute to backpacks filled with school supplies for inner-city children in need.

- **Best Practice Insights from Top Advisor, Brian P. Driscoll, Executive Director, JP Morgan Wealth Management**
  Brian is a retirement plan specialist within the JP Morgan system, and partners with wealth management advisors to support their retirement plan prospecting efforts. Brian has 40 years of experience in this marketplace and will share how he has built his retirement-plan business. He will share insights on how advisors can be leveraging retirement plans to enhance wealth management relationships, and opportunities for you (advisors) to expand your prospecting reach in 2021.

- **The New Millennium Advisor Model – Leveraging Technology in Your Advisory Practice to Grow Sales and Engage a New Generation of Investors**
  Presenter: Ryan Gensicke, Pensionmark Orange County
  Facilitator: Michael Gorelick, President, Benefit Equity Inc.
  Ryan has been in the financial services industry since 2005. He spent the first four years helping businesses design and implement tax-saving benefits such as section 125 POP, FSA, and HSA, as well as Simple IRAs and 401K plans. Ryan brings a deep understanding of the challenges facing today's plan sponsors, and a determination to help improve the retirement outcomes of plan participants.

- **"Forming Third-Party Administrator Partnerships to Grow Your Sales and Make You (Advisors) More Efficient" A Panel Discussion with Specialty Plan Design Consultants, part of the TPAbenchmark.com Network of Third-Party Administrators (TPAs).**
  TPAs are integral to the retirement pan equation, providing much-needed plan design assistance in helping advisors design an option retirement plan in partnership with advisors, and deliver ongoing outstanding service to your plan-sponsor partners. Top advisors share the plans that have a TPA attached run smoother, and result in higher plan-sponsor satisfaction, than plans that do not have TPA. We look forward to hosting this regional panel of TPAs, to share how TPAs can partner with you to grow your business.

- **Cash Balance Update and Opportunity with Accountants**
  With the extended deadline for cash balance pans under Secure Act 2.0 – advisors are seeing tremendous activity and opportunity in the retirement plan marketplace. In this session, you will hear an update on how you can maximize this opportunity in 2021.

Space is limited, so RSVP quickly to Dawn Hynes by email: dawn@hynesassociates.com. Or call 516-541-0747.