

“Insuring” your value: *protect and win*

Program summary

Winning business away from other advisors was ranked the number one growth opportunity for DC plan advisors. To remain competitive, DC plan advisors must align their service models with the evolving needs of their plan sponsor clients, which are increasingly focused on participant outcomes and financial wellness.

This program will provide advisors with a DC-specific service model benchmark as well as actionable ideas to build efficiencies into their practice and redefine their client acquisition and prospecting strategies.

Suitable for financial professionals who want to:

- Adapt their service models to help elevate practice
- Stay ahead of evolving plan sponsor demands
- Demonstrate their value in improving participant outcomes

Key benefits:

- Use Nuveen’s proprietary research on the services plan sponsors say they value most to benchmark DC plan advisors’ own service models
- Take an objective approach to evaluating the current practice’s operating model, including strengths as well as gaps, in the context of industry evolution

Curriculum components



Presentation

- This CE-eligible financial professional presentation utilizes education, assessment and implementation strategies to help plan sponsors elevate their practice



Workbook

- Help DC plan advisors to objectively assess the current state of their practices and define current value propositions
- Determine any service model gaps relative to industry innovations
- Identify opportunities for expansion and efficiencies
- Define a target client profile for future prospecting efforts

Contact your Nuveen Advisor Consultant today at 800.221.9271 for more information.

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