



## Retirement ACADEMY

Please join us for the third  
"Retirement Academy"  
event with the man who wrote the book on 401(k)  
sales,  
Chris Barlow.

# 11.10.11

**8:00 am - 8:30 am:**  
Breakfast and Networking

**8:30 am - 10:30 am:**  
Presentation

Whether you are a proven 401(k)  
producer or just getting started, you and  
your team will benefit from this event by  
hearing strategies to assist you with  
optimizing your 401(k) business.

The event will be held in  
conjunction with  
**PlanTech, Inc.:**

Birmingham Botanical  
Gardens  
2612 Lane Park Road  
Birmingham, AL, 35223

**Please  
respond by  
November 1,  
2011**



### **Topics of discussion:**

#### **401(k) Business Plan Development , Preparing For Your Journey**

Information to help prepare financial professionals to successfully acquire and retain 401(k) retirement plans by developing their business plan. Defining their value proposition, goals, activities and monitoring strategy are primary topics discussed.

#### **401(k) Prospecting & Profiling**

Discusses various 401(k) retirement plan prospecting strategies and profiling approaches. The presentation evolves the thought that effective prospecting facilitates profiling and complete profiling enhances the success of sales presentations. The 401(k) Sales Champion Workshop Profiling Menu is introduced.

### **About the presenter:**

**Chris Barlow** has served the 401(k) marketplace for nearly 30 years and is founder and Managing Director of KnowHow 401(k), a consulting firm that provides Financial Professionals with sales and service support products designed to maximize their potential in building their 401(k) business.

He is co-author of two books, *401(k) Sales Champion* and *How To Build A Successful 401(k) and Retirement Plan Advisory Business* and is the developer of the 401(k) Sales Champion Workshop. Each attendee will receive a copy of Chris' new book along with a profiling menu.

### **Sponsors include:**

OneAmerica, Prudential, Blackrock, T. Rowe Price, and Fidelity

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