

9/10 Consortium Development Prep for Annual Meeting Agenda

1) Marketing Template

- Review and approve
- Approved
- Ann to include a copy with the minutes.

2) 2022 Activity

How will we market to:

CPAs

CPE

- BPP is applying for national accreditation
- BPP is creating presentations that follow the guidelines set forth
- TCG can use the slides that BPP creates
- TCG can create their own slides and send to BPP for submission
- BPP may ask TCG members to pay for any cost associated with getting their slides approved
- Corey Metz will present to TCG to explain the process and guidelines

Conferences

- Research speaking opportunities at the state level
- Research opportunities at the national level
- We will use the CPE approved presentations
- Do we exhibit at any of these?

CPA/TPA Best Practices Program (The Bob Chin Program)

- Encourage CPAs to work more closely with TPAS
- TCG will provide the CPAs with practical info they can work with- i.e., 401(k) and Cash Balance
- Call the CPA on each new plan to offer assistance
- Offer to train new employees
- Ann will work with Bob to build this out

Annual Tax Guide for CPA

- Based on most up-to-date legislation

FAs

Edward Jones

- We believe that EJ is the most TPA friendly B/D and we should focus on them in 2022

- Build off the 2021 Joint Presentations- use as a pilot
- 2022-
- Create a program in partnership with EJ where do joint presentations in all territories and involve as many RKs as possible.
- Create an EJ training program-how and why to use a TPA, how a TPA can help an FAs truly assist a new client, technical presentations
- Explore partnering with EJ on Annual Reviews
- NIPA honors key people in the Industry. Could we ask NIPA to honor John Davis and EJ as a TPA friendly B/D?

Cambridge

- They approached Joe so we should explore what a partnership with them might look like

All B/Ds

- Can we speak at their national conferences, using presentations we already have?

Conferences

- NAPA Summit? NAPA Firm Partner \$11,500, otherwise \$27,500
- Wealth@Work?
- Ary Rosenbaum
- Jan. 21, 2022
- Las Vegas, NYNY
- 35-50 FAs
- \$100 for 4 hours of content
- Sponsorships are \$1,500 for 20–25-minute presentation, \$750 to sponsor Meet & Greet, \$500 2-3 minute presentation

Decision:

- Theresa will call Ary to find out what his plans are for 2022
- We may be able to sponsor one workshop in each of TCG's member's regions
- Theresa will negotiate a discounted sponsorship rate
- Can we go the RKs for sponsorship help and include them in the workshop? Need to ask Ary.

Advertising

- Ads in NAPA. Net?
- Ads in Plan Advisor?

Recordkeepers

- Ops Council in 2022
- Continue to do what we have been doing

- Presentations to sales, internals and relationship management teams
- Ann continue to do her touchpoints with the RKs

SHRM, Other COIs

- Create strategy and tactics to target other associations and B to B opportunities
- Deploy in 2023

3) Social Media

- LinkedIn monthly articles
- Press Releases for New Members
- Monthly TCG Firm focus- one highlight one member firm each month and post to LinkedIn