

Guide to Promoting Your Elite Practice

When you operate at an elite level, you and your clients deserve nothing less than exceptional service and support. We reward your demonstrated commitment to helping your clients and their employees retire well—and your loyalty to Ascensus and our institutional partners—with an exclusive experience.

As an Elite advisor, you and your clients receive dedicated resources for service-related questions and business development. We also help you distinguish your retirement practice and highlight the distinctive benefits you offer clients.

This guide offers several tactics and examples of messaging you can leverage to market and promote your Elite retirement practice.

Have additional questions?

Contact your Strategic Business Consultant (SBC) to learn more about the business development support we can provide as you continue to grow your business with Ascensus.



PROMOTING YOUR PRACTICE IN THE MEDIA

Start with a press release

A press release announcing your appointment to the Elite program or your promotion to a new level in the program is an effective way to highlight your practice and your expertise within your business network. Follow the steps below to share your Elite status via your local media.

Important Note: Please ensure that you reference your practice's/firm's media policy, or coordinate with your internal media team and compliance department where appropriate. Ascensus is not responsible for compliance with your firm's media policy. Additionally, if your home office requires all media inquiries to be routed through a central contact, use the "MEDIA CONTACT" field included in the sample press release and provide that contact information for your practice/firm. If your practice is privately owned and operated and you'd like to receive follow-up media inquiries from the press directly, please feel free to insert your contact information in this field.

Create and finalize your press release.

We've provided sample messaging to help get you started. Adapt this content as needed to convey your unique value proposition and expertise. **Click the button below to download the sample press release. It will immediately begin downloading in your web browser and will be available in your "Downloads" folder.**

[Download Document](#)

The fields highlighted in gray require customization and the red text offers additional direction and context. Be sure to update and delete these fields and adjust font colors as needed before finalizing the press release. **This press release may only mention Ascensus. Please do not alter the text of your press release to reference one of Ascensus' institutional partners.**

PROMOTING YOUR PRACTICE IN THE MEDIA

Include local, trade, and social media in your promotional strategy

Prepare a list of local/regional media contacts with whom you'd like to share your news.

Identify **two to five local or regional media outlets** that you'd like to cover your press release. Check out their websites to find email contact information for their business editors and/or their general editorial inbox. Advisor-focused trade publications also re-publish notable practice management news and promotions from their advisor networks. Leverage the following contact info to share your press release with the editorial teams at these trades:

- **401kSpecialist** | banderson@410kspecialist.com
- **401kWire** | neil@investmentwires.com
- **PLANADVISER** | noah.zuss@issgovernance.com
- **WealthManagement.com** | diana.britton@informa.com

Distribute your press release.

After you've conducted a final proofread of your press release and have received approval to distribute from your practice/firm and/or media team, you can distribute your press release on a free wire service. Establish an account and distribute press releases free of charge on the following wire services:

- PRLog.org
- Issuewire.com

Be sure to publish a copy of the press release on your practice's/firm's website if possible.

Share the press release with the media.

Once the press release is live on the wire and/or your website, it's time to share it with your list of media contacts.

- Craft an email with the subject line "News from **Your Practice/Firm Name: Title of the Press Release.**"
- Write a brief note detailing that your practice/firm has issued news on your status within the Elite Advisor program and that you're sharing the press release for publication consideration.
- Attach Word and PDF versions of the final press release to your email.
- Make sure you BCC (blind copy) the email addresses of the local outlets and reporters you'd like to inform of this news. (This helps ensure that you can keep your media contact list confidential.) Leave the "To" line of the email blank or include only your own email address so that you have a copy of the message for your records.
- Send the email and then monitor for coverage from those outlets.

PROMOTING YOUR PRACTICE IN THE MEDIA

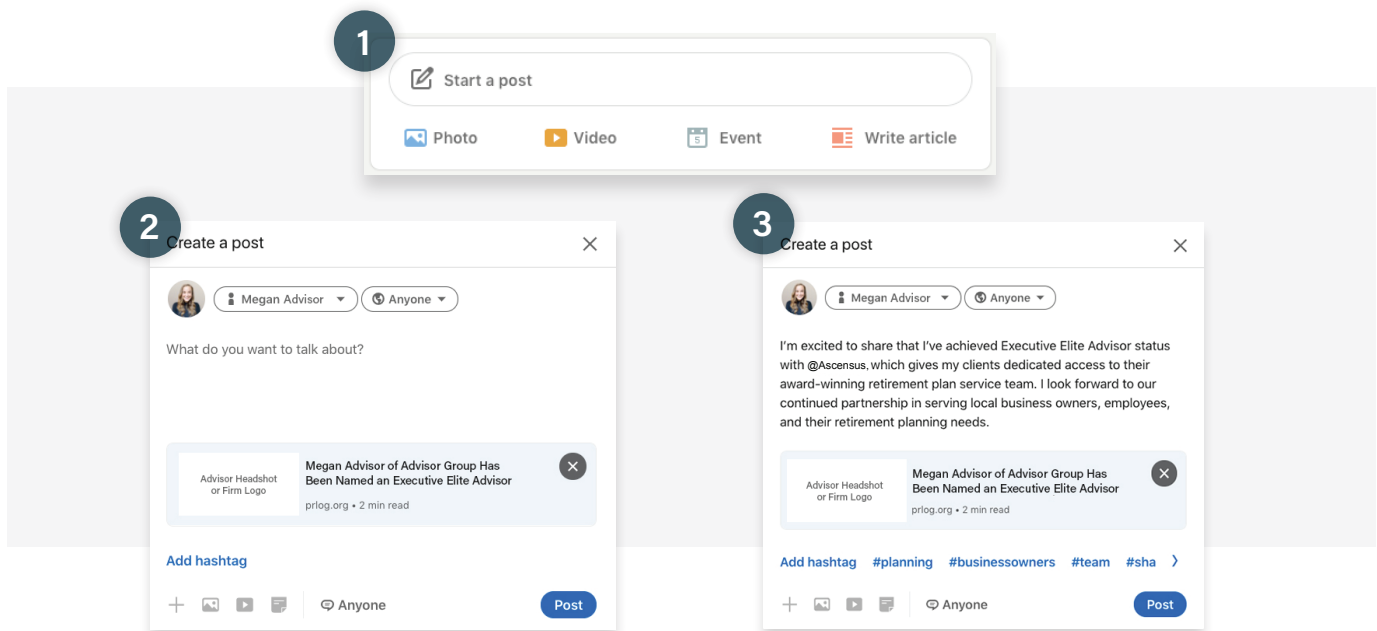
Share your news with your professional network.

Share a link to your press release on LinkedIn and other social media channels on which you actively promote your business.

To share your press release on LinkedIn*

1. Log into your personal LinkedIn account. On your home newsfeed, find the text box labeled "Start a post."
2. Copy and paste the URL to your press release into this text box. This should auto-generate a preview link to your press release in the bottom portion of the post. Delete the URL text that you've pasted into the text box. The preview link will remain.
3. Copy and paste the message below into the text box. (Personalize it as you see fit.)

*I'm excited to share that I've achieved **[Insert Level of Elite Status: Signature, Director, Executive]** Elite Advisor status with @Ascensus, which gives my clients dedicated access to their award-winning retirement plan service team. I look forward to our continued partnership in serving local business owners, employees, and their retirement planning needs.*



4. Review your post's content, ensuring that the link preview to your press release is still included. When you're ready to share with your network, hit the blue "Post" button.

*Instructions last updated in May 2023. This process is subject to change as a result of ongoing modifications and experience enhancements made by LinkedIn.

SOCIAL MEDIA STRATEGY

As previously noted, social media is an excellent channel to help promote your Elite status and remind your clients and prospects what that means for their service experience.

Update your LinkedIn profile background photo.

Share your Elite status with members of your professional network by uploading this branded banner to your LinkedIn profile. Click the button below to download the photo. Right click on the image and choose the **"Save Image As..."** option to download it.

Download Background Photo



To change the background photo on your profile*

1. Save the photo to your device.
2. Log into your personal LinkedIn account. In the top right-hand corner of your homepage, you'll see your profile image and dropdown arrow labeled "Me." Click the arrow and select "View Profile."
3. Your background photo (located behind your profile picture) has a small blue pencil icon in the upper right-hand corner of your profile. Click that blue icon.
4. Scroll down on the pop-up and click the "Change Photo" button.
5. Click the white "Upload Photo" button, then select the Elite banner you've saved to your device.
6. On the next screen, click the blue "Apply" button.

*Instructions last updated in May 2023. This process is subject to change as a result of ongoing modifications and experience enhancements made by LinkedIn.

Share a custom social media image and personalized update.

Share this Elite Advisor image along with a personalized update to highlight your status or when you're promoted to the next level of the program.

Versions of this image are sized for LinkedIn, Twitter, and Instagram, depending on where you'd like to share. LinkedIn is a great place to start since it's designed specifically for professional networking. **Right click on the image and choose the "Save Image As..." option to download it to your device.**

Download for LinkedIn

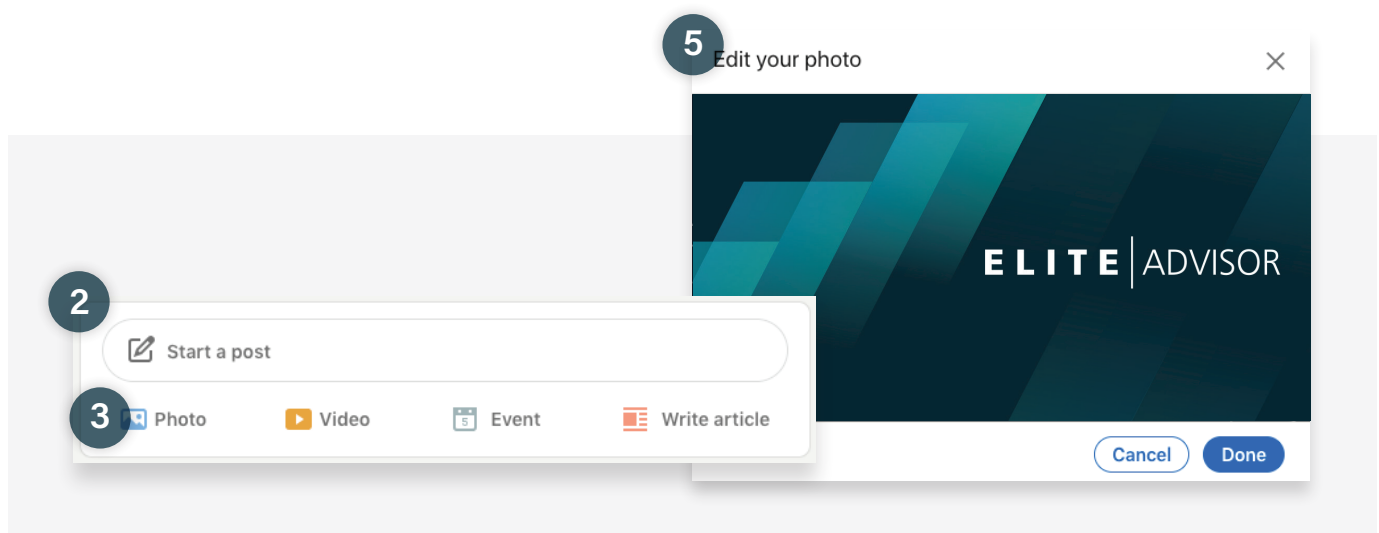
Download for Twitter

Download for Instagram

SOCIAL MEDIA STRATEGY

To share the Elite image and update on LinkedIn*

1. Save the Elite image to your device.
2. Log into your personal LinkedIn account. On your home newsfeed, find the text box labeled "Start a post."
3. Click the blue "Photo" icon to the left, underneath the "Start a post" text.
4. Select the image from where you've saved it on your device. Click "Open."
5. Click "Done" to attach the image to your draft LinkedIn post.



6. Write a custom update to share with your network, highlighting your Elite status. The sample text below can serve as a starting point. (Personalize it as you see fit.)

*I'm excited to share that I've achieved Elite status with @Ascensus. As a **[Insert Level of Elite Status: Signature, Director, Executive]** Elite Advisor, my clients will have dedicated access to Ascensus' award-winning retirement plan service team. Contact me to learn more about the Elite service experience and how I can support the retirement plan needs of your business and employees.*

*Instructions last updated in May 2023. This process is subject to change as a result of ongoing modifications and experience enhancements made by LinkedIn.

ADDITIONAL PROMOTIONAL TACTICS

Promote your Elite status via your email signature.

Leverage this custom graphic in your email signature to promote your status as an Elite advisor. Click the button below to download this graphic. Right click on the graphic and choose the "Save Image As..." option to download it.

Download Email Signature



Consider updating your presentation materials.

Contact your SBC for a slide you can insert into your presentation materials to promote the unique benefits of your Elite status to your clients.

Questions?

If you have any follow-up questions about how Ascensus can further support your business development and practice management needs, contact your SBC.

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