ELITE | ADVISOR

Insights to Help You Optimize Your Business

Your growing retirement plan business requires actionable insights to inform client meetings, drive strategy, and demonstrate value to your clients—and the Elite Advisor Partnership Review puts it all at your fingertips.

Support that grows with you

With the Elite Advisor program, the more plans you add, the more guidance you receive—and you'll earn many exclusive benefits that make it easier to scale your retirement plan business. Your service contact provides an enhanced level of support for you and your clients. And your Strategic Business Consultant (SBC) focuses on your business to minimize risk, provide actionable insights to highlight opportunities, and build efficiencies.

A complete picture with actionable insights—all in one place

The Elite Advisor Partnership Review, presented by your SBC, provides a holistic view of your retirement plan business with Ascensus and our partners, with an eye on plan health and retention. It includes plan details, analytics, and insights—and recommends actions you can take today to yield improved results tomorrow.

Executive summary
A review of all we've achieved together and other important information

Business analysis
A comprehensive look at the plans you have with us, identifying meaningful trends

Elite Advisor Partnership Review

Insights and analytics
Plan details and data-driven insights into plan health and retention

Action items
Strategies we can implement together to enhance and protect your plans

Exclusive Benefits and Expert Support

As an Elite Advisor, your commitment to your clients and your continued business with us are rewarded with exclusive benefits to help you:

- Deliver high-touch client service
- Distinguish yourself as an experienced advisor
- Scale your business

Learn More

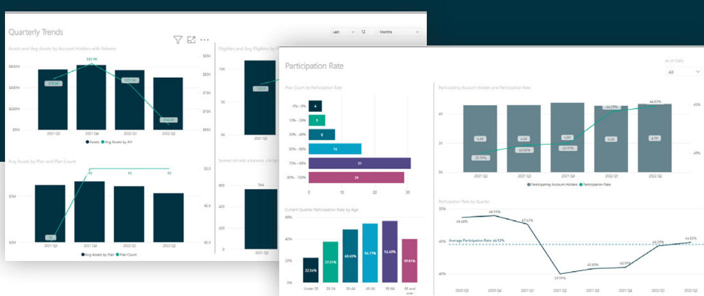
A Holistic View of Your Retirement Plan Business

Know your plans inside and out

Your SBC conducts an in-depth analysis of your business to identify trends, highlight opportunities for improvement, and uncover potential vulnerabilities. These findings—along with a summary of the products and services your clients are, or are not, taking advantage of today—help you deliver strategic guidance and demonstrate value to clients.

Drive plan retention with deeper insights

Leveraging data from plan health reports—and platform observations from our State of Savings publication—your SBC identifies predictors of attrition and makes recommendations to help ensure client retention.



Track activity and measure success

The review includes a status of partnership goals and initiatives along with the results of recommendations that have been implemented. You'll see how participation, savings rates, and the overall health of your business have improved over time.

Be ready to take action

Your SBC recommends ways we can work together to optimize your business, such as:

- Implementing solutions to boost participation, ease administration, and create efficiencies in your practice
- Identifying clients that may need to prepare for audits and ways to help
- Prospecting support and intelligence

For more information on the Elite Advisor program, please contact your sales team.

Contact Us

ASCENSUS

alwayshaveaplan.com