



# How to DOMINATE the Qualified Plan Market

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## **Below are a Number of Ideas to Help you Break into the Qualified Plan Market.**

**Let us Help you Dominate the Market.**

- Cal Savers – Are you a CA rep? Do business in CA? Let your client know the custom designed qualified plan for their company may be a better alternative than CalSavers. Ask for the opportunity to illustrate the differences and advantages.
- Most states now have their own version of the mandated state retirement plan. Can your clients benefit from a customized plan instead of their one-size-fits-all state plan?
- Gather all your files on business owners, call them, and offer second opinions on their plans (SEP, SIMPLE, Payroll company 401k).
- Ask all your clients for their business and personal tax return. (How else will you “know your client”?) The tax return will provide insight into how to advise on tax issues.
- Consider obtaining a list of all plans within a ZIP code. We can help with this. Sort the list and ask CPA acquaintances for introductions to those they may know.
- Offer virtual “lunch and learn” events for CPA firms or even with a potential client. This is a good way to demonstrate all the benefits of qualified plans.
- Using LinkedIn, sort friends/business acquaintances of client. Ask the client for referrals from those on the list you feel are candidates.
- Do you have a newsletter? Include qualified plans as a topic, along with one of our compliance approved items.
- Are you a member of a Study Group? Bring up the topic of custom designed qualified plans. Bill will be happy to address an upcoming meeting.

- Consider setting one coffee, lunch, or breakfast meeting per week with a CPA or Center of Influence. Discuss the benefits of qualified plans.
- Do you belong to groups such as Rotary, Lions Club, or similar associations? Consider a virtual meeting with Bill discussing the merits of qualified plans.
- Do you live in a neighborhood that has a homeowner's association? Have you considered obtaining a copy of the members, looking for business owners?
- After obtaining the tax return of your client's business, compare the tax liability with and without the qualified plan contribution. Have us help you demonstrate tax savings with a qualified plan.
- Does your client have a SEP? Let us help you demonstrate why a SEP is often **not** the plan to use.

**HAPPY TO HELP YOU ALONG THE WAY**

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