Introducing the “Advisor Resource Center” (ARC) – a web based portal designed to help broker-dealers and their producers maintain compliant and profitable ERISA businesses and improve coordination with strategic partners.

From prospecting and account opening to sales support and supervision, ARC delivers a single point of access from which to operate, scale and manage retirement plan business.

Integrating both proprietary and third party resources, ARC provides retirement plan advisors with all of the necessary components to grow and maintain a successful retirement plan practice, including:

1. **Practice Management Resources** for advisors of all experience levels with a searchable library of best-in-class materials relating to all aspects of retirement plan sales and services;

2. **Investment Analytics and Benchmarking** offering access to unique versions and special pricing for the industry’s leading providers of retirement plan tools and reports;

3. **Product Search Capabilities** via a customizable matrix of retirement plan providers with search criteria ranging from advisor rollover support to outsourced 3(21) and 3(38) fiduciary solutions;

4. **Education and Training** delivered through a proactive web-based series and links to additional resources, forums, regulatory updates and industry conferences;

5. **PRI’s Advisor Resources** is a series of proprietary advisor- and client-facing educational tools and marketing materials designed to help advisors achieve economies of scale and differentiate their services through more robust non-fiduciary solutions that align with the new challenges facing plan sponsors; and

6. **Document Management** tools facilitating compliance, supervision and sales by delivering real-time access to data, forms and reports automating workflow i.e., account opening, initial and ongoing disclosure mandates, electronic delivery systems and more.
Advantages to ARC Partners –
Product Providers, Investment Managers, Recordkeepers, Tools and Training Providers

ACCESS – ARC delivers systematic access to an untapped segment of broker-dealers and investment advisors comprised of hundreds of firms with between 100-1000 representatives. The nature of the ARC platform facilitates targeted communications to advisors that are active in the retirement plan marketplace at all levels.

COST SAVINGS – By combining web-based resources with proactive sales support and training, ARC provides a highly efficient way to connect remotely with advisors who may not be visible on the conference circuit or affiliated with a national “focus firm.”

ENHANCED VISIBILITY – Whitepapers, tools, and value add materials are positioned and promoted within ARC based upon their area of relevance. Provider metrics are prominently displayed on the ARC product matrix, and advisors can link to territory maps to connect with their local representative. Participation in PRI’s monthly “Provider Spotlight” series, sales coaching calls, case studies and success stories can further enhance exposure and differentiation.

INTELLIGENCE AND GROWTH – PRI provides partners with continuous feedback and intelligence, including advisor survey results on products, resources and tools, usage and content tracking, etc. to assist in the development and testing of new products, enhancements and targeted communications.

The PRI team welcomes the opportunity to help you develop new clients and strengthen existing relationships through the Advisor Resource Center.

Please contact Amy Glynn or your PRI representative for more information;

AMY GLYNN
President and Founder
aglynn@pension-resources.com
617-834-0900