
Build Rapport and Help Create Financial Confidence with the Plan Sponsor Implementation Kit

Dear <Plan Advisor Name>

Congratulations on enrolling <Plan Sponsor Name> in Worksite Financial Solutions.

Enclosed is the Plan Sponsor Implementation Kit (PSI Kit), your all-inclusive toolbox of materials that will help your plan sponsors make the most of Worksite Financial Solutions. The contents have been customized according to the service(s) offered in the plan and include:

- The Employee Engagement Solution
- The Employee Advice Solution
- The Employee Education Solution
- The Employee Transition Solution

Below is a brief overview on how to use the contents within the PSI Kit to effectively communicate the new benefits of Worksite to your plan sponsor:

Step 1: Review and Familiarize.

- Become an expert on the tools and contents within the PSI Kit.

Step 2: Reach Out and Plan.

- Set up a time to meet with your plan sponsor.
- Inform your plan sponsor of the PSI Kit and the benefits it provides to them.

Step 3: Meet and Facilitate.

- Bring your PSI Kit when you meet with the plan sponsor.
- Present the benefits of the various services offered through Worksite and how you can help foster financial confidence by working with the plan participants.
- Review each section of the Implementation Checklist and identify which materials to use.
- Discuss with the plan sponsor how to best implement the selected materials (tools and other kit contents).
- Give the PSI Kit to your plan sponsor for their use going forward.

Step 4: Schedule and Follow Up.

- Establish checkpoints in conjunction with the Implementation Checklist (included for each solution) with your plan sponsor.
- Create a mutually agreed upon communication calendar and schedule time with your plan sponsor to track progress.

By working with your plan sponsor and integrating Worksite Financial Solutions as a benefit to their retirement plan, you can help them get their employees on the path toward a more secure financial future.

Sincerely,

The Retirement Results Team

(855) 575-4695