

ELITE | ADVISOR

The Elite Advisor program is an exclusive experience that rewards you for continuing to choose Ascensus and our partners to help your clients achieve their retirement plan goals. You've trusted us to deliver on the promise of quality, transparency, and service excellence. And we recognize that when you operate at an elite level, you and your clients deserve nothing less than exceptional.

We want to recognize your achievement as an outstanding financial advisor with a higher level of service, attention, and opportunity.

Our program will make it easier for you to:

- Scale your business through an enhanced service model, product offering, and consultative approach
- Position yourself as an expert with existing and prospective clients
- Better distinguish, market, and grow your business



JOIN THE CLUB

The Elite Advisor program is expertly crafted to help you grow and enhance your practice, and manage the unique needs and expectations that come with scale. We're here to function as an extension of your business.

- We'll work with you to identify under-performing plans and find ways to engage them.
- Your plans will receive dedicated, high-touch service.
- You'll gain an advantage in your market, distinguished by your expertise.

Three tiers of benefits provide advanced support as your business grows. Among other benefits, each tier receives a single point of contact for service and business consulting, access to guidance from our experienced team of ERISA attorneys, and exclusive access to invitation-only events.

In addition, Executive Elite advisors receive an advantage that few other advisors have: access to a member of the Ascensus Executive team. As a member of this prestigious cohort, you will have the opportunity to provide input on our direction, and leverage the expertise of our top executives.

ELITE ADVISOR PROGRAM BENEFITS

	Signature 15-29 Plans ¹	Director 30-49 Plans	Executive 50+ Plans
Dedicated Client Relationship Manager (CRM)	•	•	•
Dedicated Strategic Business Consultant (SBC)	•	•	•
Dedicated Elite Onboarding Team	Assigned Onboarding Elite Team Member and Plan Design Consultant	Dedicated Installation Coordinator for Onboarding and Plan Design	Dedicated Installation Coordinator for Onboarding and Plan Design
Business Intelligence Reporting	Delivered via Email	Scheduled Call or In-Person Meeting	Scheduled Call or In-Person Meeting
Elite Partner Experience	By Invitation 1 Attendee	1 Attendee	1 Attendee
Product Roadmap First Look	•	•	•
ERISA Attorney Consultations	•	•	•
National or Regional Advisor Steering Committee	By Invitation	•	•
Marketing and Public Relations Package	•	•	•
Executive Sponsorship			•
Venrollment ²	•	•	•

¹For Signature Elite advisors, plans with 25 or fewer participants will be supported by a team of experienced client service associates. Participant count and support are evaluated annually in September.

²Subscription covers up to three user licenses for Ascensus, Goldman Sachs Workplace Retirement Solution (GWRS), and Vanguard Retirement Plan Access™ (VRPA) plans.

Ascensus reserves the right to modify Elite Advisor program requirements and benefits at any time.

ACHIEVE EXCELLENCE

Drive growth and scale with highly personalized service for your current clients, and the tools to win more.

- **Dedicated Client Relationship Manager (CRM):**
A single point of contact for all service-related questions for you and your clients.
- **Dedicated Strategic Business Consultant (SBC):**
A single point of contact for your ongoing practice management needs to:
 - Ensure exceptional client service across plans
 - Deliver strategic insights
 - Provide custom solutions for business development
- **Dedicated Elite Onboarding Team:**
Executive and Director Elite advisors are assigned a dedicated Installation Coordinator to manage the onboarding and plan design process. Signature Elite advisors work with an assigned member of the Elite Onboarding Team and a plan design consultant.
- **Business intelligence reporting:**
Critical plan insights, design, and benchmarking data through reports such as Book of Business, Compensation, Market Value,⁶ and Fiduciary Decisions.⁷
- **Elite Partner Experience:**
This Ascensus conference brings together advisors and key distribution partners to inform, educate, exchange ideas, and develop business strategies. Director and Executive Elite advisors may receive an invitation for one attendee. Certain Signature Elite advisors may also receive an invitation for one attendee.
- **Executive sponsorship:**
Exclusive to Executive Elite advisors is a formal pairing with a member of the Ascensus Executive team, which will present additional opportunities to offer suggestions, share ideas, and deepen our relationship.
- **Product roadmap first look:**
A preview of our pipeline for product enhancements and new releases.
- **ERISA attorney consultations:**
Access to guidance from our team of legal experts on technical retirement plan issues and regulatory matters.
- **Invitation to join National or Regional Advisor Steering Committee:**
An opportunity to be a part of a sub-group of Elite advisors who help shape the direction of the Elite program.
- **Marketing and public relations package:**
Marketing materials to promote your achievement of Elite status.
- **Venrollment:**
A digital platform that enables advisors to create custom education videos and advisor messages to enhance the participant education experience. Up to three user licenses are included through your Elite status.

Your Strategic Business Consultant puts you at the center.

Your dedicated SBC works as an extension of your practice, partnering with you to optimize your Ascensus and partner plans, and offering strategies to create efficiencies. This experienced professional serves as your personal advocate and guide to ensure you're taking advantage of all Ascensus has to offer you as an Elite advisor.

You deserve nothing less than exceptional.

As an expert in the retirement industry, you know how important saving for the future is to your clients—and more importantly, how to get results. We want to help you leverage your stature and demonstrate your value. As you ascend the ranks of the Elite Advisor program, we'll make sure you are supported and recognized every step of the way.

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

 800-345-6363  retirementsolutions@ascensus.com



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⁶All Elite advisors will receive this report by email, and Director and Executive Elite advisors will receive the added benefit of reviewing it in person or during a scheduled call with their SBC.
⁷Upon request, Signature Elite advisors will receive up to 10 reports a year. Director Elite and Executive Elite advisors may request an unlimited number of reports.