

Karel - Gordon & Associates

PENSION CONSULTANTS, PLAN ADMINISTRATORS AND ACTUARIES



Advisor Connect | Your TPA Partner Can Help You Win Business

MAKING IT ACTIONABLE

When it comes to the administration of retirement plans, most TPAs can execute the work pretty competently. While there are differences in quality of process and internal expertise, most of this is technical work that happens behind the curtain. As a result, the vast majority of advisors and clients generally don't see or perceive these differences.

Where we really differentiate are in three important areas you and your clients DO see and experience.

- 1 | Your consultative partner**
We listen and understand how to map the right plan design options to the right client to craft and optimize a retirement plan that can meet their tax and savings goals. We're happy to work directly with you and your clients to illustrate best options and provide expert guidance to get this right.
- 2 | Make a smooth introduction**
Once we have an agreement, clients experience our onboarding process. It's an important opportunity to reaffirm the quality of the decision to do business with us - and you.
- 3 | Maintain quality service**
The quality of our ongoing work and our communications about the periodic and annual operations of the plan can cement positive, long-term business relationships. We're here to support you and meet with clients to review performance and make recommendations to keep things on track.

As Peter Drucker once said, "**Efficiency is doing things well; effectiveness is doing the right things.**"



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ACTION TO TAKE NOW

Review your practices and evaluate the way you have been doing business with both new and long-standing partners. Are you representing yourself well in all three of these key areas? If not, consider ways to improve your service and really stand out from the crowd.

Some people say that “winning new business is job one.” We think that it’s just as important to demonstrate excellence in our support of existing relationships. That creates referrals, holds turf, and ultimately tells others why we’re a great partner.

We’re here to help you win business – and keep it. Give us a call and learn how.