

# Financial Professional's Value

www.rolloversystems.com

## About RolloverSystems, LLC »

RolloverSystems, LLC (RSI) is America's only independent fully-integrated platform designed to manage and execute end-to-end terminated participant services for retirement plan sponsors. Founded in 2001, Charlotte based RSI works with more than 7,000 retirement plan clients, containing over 850,000 participants and processes \$1B in participant transactions annually. Our team of licensed Retirement Center counselors provides assistance to terminated participants of all balance sizes with education, access to objective investment choices, and transaction facilitation. RSI also specializes in plan termination assistance, automatic rollover (ARO) and missing participant services.

## Benefit Spotlight »

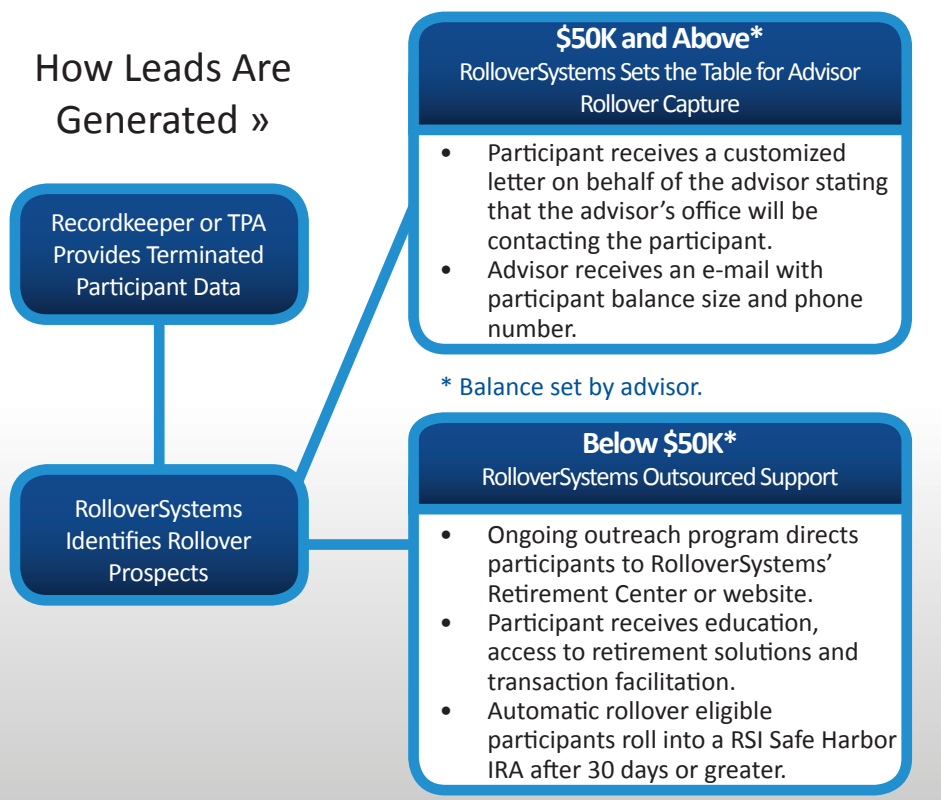
### » Protect your plan assets

- Comprehensive rollout strategy for all plans
- Identify the most attractive rollover-eligible participants through RSI's Systematic Lead Generation Service
- Proactive outreach on your behalf sets the table for your wealth management practice

### » Secure your plan relationships

- Automatic Rollover Services can improve a plan's bottom line and reduce the plan sponsor's inherent liability of maintaining relationships with terminated and missing participants
- Proactive participant outreach is provided to 100% of terminated participants regardless of their account balance
- Receive detailed plan and participant reports to monitor rollover activity

## How Leads Are Generated »



## Next Steps »

### » Advisor rollover consultation

- Discuss your program options and ask questions about your rollover needs
- Identify critical questions and key personnel

### » Plan onboarding and setup

- Your road map to success through rapid plan implementation
- RSI provides all resources
- Your involvement can be minimal

### » Wrap-up call

- RSI provides progress updates
- Address any outstanding deliverables