RETIREMENT SERVICES

ADP **Accelerate**

Worksheet: Accelerate your value proposition

Always Designing for People®

Sample value proposition:

David Jones, CFP® Financial Professional

- For over 20 years, I've focused on helping business owners and plan sponsors confidently select and manage the right retirement plan for their company and their employees.
- My goal is to provide the resources, education, insights, and data to help the business owners I serve to make informed choices that lead to higher participation and deferral rates, as well as better retirement planning outcomes for participants.
- Just as important, my team and I are committed to helping plan sponsors gain a full and meaningful understanding of their crucial role as fiduciaries.
- As a CFP®, I bring an in-depth understanding of the factors that can influence employees' retirement goals and planning. To augment my own background as a goals-based planner, I've built a team that helps address a wide range of retirement plan needs — from investment selection and plan maintenance to the participant engagement programs that help employees understand their choices and know where they stand as they progress toward their goals.
- My partners and I focus on serving professional services firms with 100 employees or fewer. This includes medical and dental practices, as well as legal accounting, and management consulting firms. By focusing on these businesses, we've been able to gain greater visibility into the needs and questions they routinely face. We strive to act as an extension of our business owner clients' firms, supporting them in areas beyond traditional retirement plan services.
- One very important way we're able to do this is by providing clients access to a range of ADP resources that encompass both retirement and HR management technology, support, compliance, insights, and innovation.
- This can mean integrating payroll with retirement plan services to help business owners streamline processes for employees and manage both functions more easily.
- It can also mean providing an ongoing stream of thought leadership on HR and employment trends, compliance insights, as well as retirement plan health — to help plan sponsors make more informed, confident decisions.
- By integrating ADP Human Capital Management resources into my practice, I'm able to accelerate the value I provide to business owners.

Considerations:

Who are the specific business owners you're best set up to serve — and what services do you offer to help them run their companies more effectively?

What special capabilities and credentials do you bring to serving business owners and their employees?

How do you describe the complementary skills and abilities your team brings to serving business owners?

Clear

Accelerate your value proposition

Complete each section below — the WHAT, WHO, and HOW that makes up your value proposition for business owners and clearly describes what's in it for them?

1. What do you offer business owners?

Notes:

Describe the services you provide along with details about what makes you stand out from other retirement plan advisors.

2. Who are the business owners you serve today?

Describe the types of businesses you serve. Provide specific qualities of your practice that make you especially capable of serving those businesses.

3. How do you deliver on the promise of your value proposition?

Offer specific ways you and your team bring together skills, capabilities, and credentials to serve the needs of business owners.

The Certified Financial Planner ("CFP") program is administered by the Certified Financial Planner Board of Standards Inc. The certification exam features these topics: Professional Conduct, General Principles of Financial Planning, Education Planning, Risk Management and Insurance Planning, Investment Planning, Tax Planning, Retirement Savings and Income Planning and Estate Planning. CFPs must satisfy continuing education requirements.

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