Empowering Wealth

Guest Guide for Partner Sessions

Advisor Council & Generation (k)ultivate

1. Call Format

Q. What does the call look like?

A. Sessions are held via Zoom in a one-hour slot. A member of our team will open the call, say a few words about the partnership, and then introduce you. You'll present for 30 to 40 minutes, followed by a 10-to-15-minute Q&A with the group.

2. Target Audience

Q. Who will be on the call?

A. We host two distinct groups, and your session is targeted at one of them. Here's who you're speaking to:

Advisor Council — Specialist Advisors
These advisors have robust employer plan practices and a high level of plan knowledge. They want depth — nuanced plan design, competitive positioning, and market intelligence. Don't hold back on complexity.

Generation (k)ultivate — Generalist Advisors
This group is actively building their employer plan practice. Some also have a wealth management focus. Lead with practical application: how does what you're covering help them start a conversation, win a plan, or serve a client better?

Consider providing a one-page handout that gives contact information or covers your talking points.

3. Tone & Style

Q. What tone should I aim for?

A. Think of this as a peer conversation, not a product presentation. Our advisors respond to credibility, directness, and practical relevance. If you have a point of view, share it. The goal is to be informative and provide easy to apply knowledge — not to pitch. Be on camera, be yourself, and keep it conversational.

4. Recording & Distribution

Q. Will the call be recorded? Where will it go?

A. Both calls are recorded and distributed to the relevant group via follow-up email after each session.

- Gen(k) recordings are also posted to the Employer Plan Consulting website, typically about one week after the session. Council recordings are not posted publicly.
- After the session, you'll receive the attendee list for your call. You're encouraged to reach out to attendees directly — this is part of how we want the partnership to create real ongoing value beyond the call itself.

5. Pre-Session Preparation

Q. What should I prepare before the call?

A.

- Prepare a PowerPoint slide deck that covers the agreed-upon topic. Keep it tight and presenter-driven — this audience reads slides fast.
- One week before the call, we'll schedule a brief review session with you to walk through the deck, answer any questions, and align on framing for your specific audience.
- On the day of the call, please log in 15 minutes early so we can test screen sharing and confirm everything is working before we start recording.

6. Technical Setup

Q. Are there any technical requirements?

A.

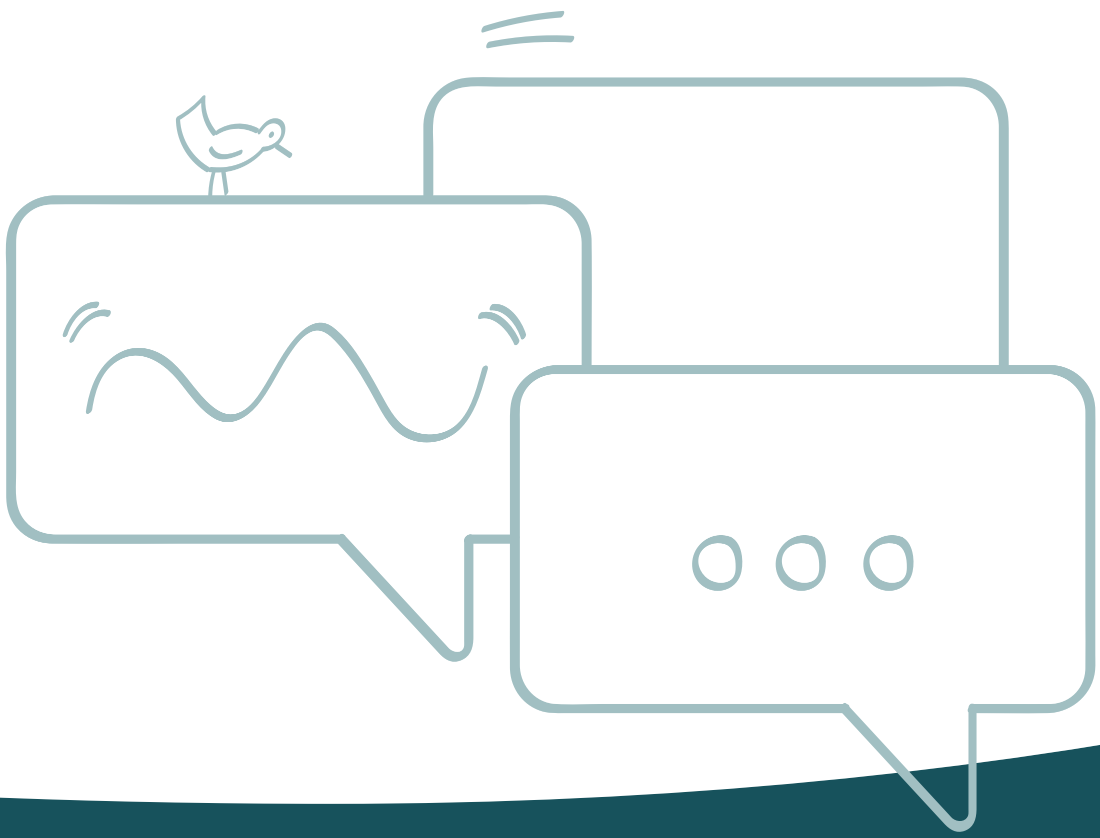
- Use a good microphone — built-in laptop audio often picks up room or background noise.
- Be in a quiet, distraction-free environment.
- Ensure good lighting and keep your camera on for the full session.
- Test your screen sharing setup during the 15-minute pre-call window on the day of the session.

Optional

Post-Session Engagement

To help extend the value of the discussion and reinforce key concepts, we may offer **post-session office hours** on a case-by-case basis. During these office hours, attendees can remain after the formal presentation to engage directly with the presenter in a more informal, one-on-one setting, ask follow-up questions, and explore topics in greater depth. Presenters are also encouraged to invite an **Advocate Advisor from Osaic** to participate in these sessions. Advocate Advisors can provide additional context, practical insights, and real-world perspectives that complement the presentation content and enrich the discussion.

Following the session, presenters may choose to share **key takeaway materials**, resource guides, or brief **knowledge checks/quizzes** to continue the conversation and help solidify content retention. These follow-up resources can reinforce learning, encourage ongoing engagement, and provide attendees with actionable next steps.



Contact us

Please don't hesitate to reach out with any questions. We're glad to have you —
and genuinely excited about what this partnership can do for our advisors.