

The resources in our Sales Accelerator encompass tools from RPAG and other products that have been chosen specifically to help you purposefully grow your employer plan business.



Generation (k)ultivate

A monthly study group for financial professionals to collaborate, network, and learn more about the employer plan space as they make it a purposeful part of their practice.



Plan fees benchmarking

An easy way to produce a report that illustrates how a plan's current fees compare to other plans with a similar AUM and participant count.



RFP express

Streamline the process of providing a full live-bid benchmark report by using RPAG's RFP Express — the industry's most accurate and efficient RFP system.



Fiduciary investment review

RPAG's proprietary Scoreboard System provides a proven process to monitor and evaluate fund manager and investment strategies, based on a 10-point numerical scoring system.



Plan prospecting

Quickly and accurately identify new client relationship opportunities. You can customize your analysis by categories such as location, plan type, asset range, participant count and more.



MyCMO marketing

MyCMO provides you with a convenient hub to manage your client communications. There is a pre-approved content library, built in compliance workflow and opportunities to get the right message the right people.

Services provided by RPAG:

- Plan fees benchmarking
- Advisor compensation benchmarking
- RFP express proposal tool
- Plan investment scorecard and review
- Fiduciary briefcase
- Fund lookup tool

Services provided by the Osaic Employer Plan Consulting team:

- Plan prospecting search tool
- Generation (k)ultivate monthly study group
- MyCMO
- Sales support

Each license is specific to the Financial Professional enrolling. This package costs \$1,500 annually, billed monthly as \$100 for the package and \$25 for MyCMO. If a financial professional is already subscribed, or chooses not to enroll in MyCMO, the Sales Accelerator package is \$100/mo.



Wealth Management
Employer Plan Consulting