



# The Networ(k)

## Bringing Experts Together for Comprehensive Client Solutions

*The Networ(k) Program of Osaic* is designed to unite Wealth Management and Employer Plan Specialists, placing business into the hands of true experts. This program fosters collaboration between specialists in two key areas, allowing them to grow their businesses while ensuring clients receive the highest level of service.

### Key Benefits:

#### 1. Expert Handling of Employer Sponsor Plans

Employer plan clients are seamlessly transferred to Osaic's Retirement Plan Specialists, ensuring expert management.

#### 2. Comprehensive Wealth Management for Plan Participants

Plan Participants' individual needs—financial planning, rollovers, retirement, and investment management—are handled by Osaic's Wealth Management Specialists.

#### 3. Risk Reduction through Best Interest Services

By ensuring prudent and best interest services, the program minimizes regulatory risk.

#### 4. Protection from Competitor Loss

Ancillary business from both lines of business stays within Osaic, preventing losses to competitors.

### How It Works:

#### 1. Client Review

Wealth Management and Employer Plan Specialists review current clients to identify business that may be lost due to lack of expertise.

#### 2. Collaboration Opportunities

Specialists reach out to the Employer Plans Consulting Team for a list of qualified professionals in both fields. They choose a partner who complements their skills and forms a collaboration.

#### 3. Formalize the Partnership

Once a partner is identified, the relationship is formalized by executing a relationship form and creating a Joint Report Code, ensuring compliance and agreement with OSJ/FLS for both professionals.

### Take the Next Step:

By participating in The Networ(k) Program of Osaic, specialists can grow their business, improve client satisfaction, and safeguard against competitor threats. Leverage the expertise of trusted partners and ensure your clients are receiving the best-in-class services. Reach out to the Employer Plans Consulting Team at [employerplans@osaic.com](mailto:employerplans@osaic.com) for more details.