Tap into the potential of your practice.

Introducing Monarch, a comprehensive new business building and client management system from Ann Schleck & Co. If you’re an advisor or consultant who works with retirement plans, Monarch is created specifically to be the catalyst that accelerates the growth of your practice.

Add a catalyst to a chemical reaction and it will be faster, stronger and more useful. Add Monarch to your practice and it will energize areas of your business you want to get moving. It will help you become more efficient and effective. It will help improve what you’re already doing, quickly and practically, in ways that make sense to you and add value for your customers.
a catalyst for growth

OUTSIDE OBJECTIVITY. INSIDE EXPERTISE.
MONARCH COMBINES THE OBJECTIVITY OF OUTSIDE CONSULTANTS WITH THE EXPERTISE OF EXPERIENCED INDUSTRY VETERANS. WE KNOW HOW TO CREATE THIS IDEAL SYNTHESIS AT ANN SCHLECK & CO. BECAUSE WE'VE WALKED IN YOUR SHOES — WE'VE BUILT SUCCESSFUL CONSULTING PRACTICES. AND WE'VE BEEN ON THE CUSTOMER SIDE TOO — WE KNOW WHAT PLAN SPONSORS LOOK FOR, WHAT THEY VALUE MOST.

It takes smarts, experience and hard work to manage and grow an advising/consulting business. It's an all-consuming, everyday challenge, and your mailbox is full of messages pushing selling systems with their own agendas. But you won't consider adding new tools to your mix unless they’re smart, easy to use and effective, unless they’re catalysts for growth.

That’s Monarch. Let us show you.
MONARCH BUNDLES SCORES OF PRACTICE MANAGEMENT TOOLS AND CLIENT-READY TEMPLATES YOU WON’T SEE ANYWHERE ELSE. WANT TO IMPROVE YOUR VISIBILITY, INCREASE YOUR CLOSE RATES AND RETAIN MORE CLIENTS? MONARCH CAN BE THE CATALYST. HERE’S WHY.
objective
We’re only working for you. Ann Schleck & Co. is an independent, trusted resource in the retirement consulting world. You get more than 30 years of experience brought together solely to help you manage and grow your business.

deep
Monarch is a rich resource. It gives you answers to current issues that are relevant to your practice and access to ongoing research as new trends develop. You get more depth, more choices and more client management, retention and growth strategies. You get a wider range of tools and insights you can use.

flexible pricing
Put Monarch to work for your practice right now at www.annschleck.com. Subscribe to the entire Monarch system, or Fee Benchmarker as a standalone tool. Group subscriptions are also available; talk with your broker/dealer, investment manager or retirement providers.

comprehensive
Monarch provides more usable solutions. Many of the modules are first to the market and won’t be available anywhere else. The client management track is new. The new Fee Benchmarker,™ by itself, is worth going online at www.annschleck.com and taking a closer look.

multiple formats
Once you or your company has subscribed, all the modules are available to you online, 24/7. You can also access Monarch’s pre-recorded practice management Webcasts.
FEE BENCHMARKER™

OUR POWERFUL, NEW TOOL LETS YOU COMPARE YOUR FEES AND SERVICES TO INDUSTRY AVERAGES.
How do you compare?
Fee Benchmarker.

A few simple steps and you have a sponsor-ready report that compares what you charge to what others charge. The report also compares your services for a specific defined-contribution plan to similar practices, both commission and fee-for-service models.

Compare proposed or current fees for a specific plan size with a large database of other retirement practice fees. With Fee Benchmarker, you can easily see:

• Fee ranges for similar business models and where yours ranks.
• How your services compare to those of other advisors/consultants.
• Normative fees for retainers and one-time projects.

There’s no client-management resource like Fee Benchmarker.

• Information from an independent and trusted source.
• Reports ready to show plan sponsors.
• Easy access to credible fee justification.
• Easy to subscribe to and use.

Fee Benchmarker is included in your subscription to Monarch or can be purchased by itself. You can subscribe online or through your broker/dealer or retirement providers. Just go to www.annschleck.com and click Monarch Login/Subscribe.
three tracks

TWELVE MODULES

Use the latest best practices to grow your business. Twelve Monarch modules on three tracks make it easy.

• Each is designed to take you from concept to action in hours, not days.

• All let you focus on the most relevant issues for your practice and create tangible results for your clients.

marketing track

These two modules will help you differentiate yourself from the competition by developing an effective value proposition and marketing plan.

sales track

These five modules will drive new business and improve your close rate with new tools, training and coaching.

client management track

These five modules are rich with client-retention tools. The strategic planning and relationship management templates let you anticipate your clients’ needs and deliver more value with more skill and precision.
module 1
Define your target market and build a marketing plan. This will help you increase the visibility of your practice.

module 2
Differentiate your business to clients and prospects. Here’s a step-by-step guide for developing your value proposition. It includes a library of sales messages you can use to build your story.

module 4
You can easily create a sales plan and manage your pipeline using these planning templates.

module 5
Conduct a prospect needs analysis and develop a targeted pursuit strategy for top prospects.

module 6
This module guides you through the process of developing your pitchbook, including sample presentation content. It shows you how to demonstrate the value you deliver to prospects.

module 7
Learn how to deliver a dynamic team presentation. Here are practical tips on how to transform prospects into buyers.

module 9
This guide helps you develop a client service strategy. It takes you through the process step by step.

module 10
Work with each client to develop a relationship plan. These templates will help you. This is a critical part of client retention.

module 11
Here’s a great resource for conducting a plan review with clients and prospects. It includes benchmarking plan design, provider services and fee assessments.

module 12
This is filled with strategies and tools for demonstrating your ROI to clients, including your annual fee and service disclosure. Here’s where our new Fee Benchmarker can really pay off for you.

You’ve had moments in your life when an idea or decision transforms things for the better. Here’s another one. We’re ready to help you manage and grow your practice with hands-on marketing, sales, client management and fee-comparison tools in easy-to-use formats.

Monarch subscribers get 24/7 access to the complete system for an entire year. Subscriptions are sold on an per user basis. Group rates are also available by calling 651.236.8280.

Monarch Complete
$5,000 for up to 3 users

- Unlimited online access to the Marketing, Sales and Client Management Tracks
- Unlimited use of Fee Benchmarker
- Access to pre-recorded training sessions for Monarch curriculum.

Fee Benchmarker
$1,000 per year

- Unlimited use of Fee Benchmarker

Fee Benchmarker (one-time use)
$200 per fee report
SUBSCRIBE NOW AT WWW.ANNSCHLECK.COM.
FOR MORE INFORMATION, PLEASE CONTACT US.

Ann Schleck       Ann@annschleck.com
Sue Kelley        Sue@annschleck.com
ANN SCHLECK & CO. PROVIDES STRATEGIC MARKETING, SALES AND CLIENT SERVICE CONSULTING TO THE RETIREMENT INDUSTRY, WITH A FOCUS ON RETIREMENT SERVICE PROVIDERS, ADVISORS AND CONSULTANTS.

For information, please contact us at www.annschleck.com.

Ann Schleck  651.687.0118
Sue Kelley  651.236.8280