Thornburg Sales and Marketing Retirement Guide

Thornburg
INVESTMENT MANAGEMENT

Value-Added Support: We recognize the challenges you face in managing your time and determining the best course of action for developing your retirement plan business. To assist in your efforts, Thornburg has developed marketing materials designed to "leverage" your time and target your message to prospective plan clients.

Thornburg offers real value-added strategies, and innovative asset management for financial advisors and plan intermediaries. We are committed to helping you build your retirement plan practice.

Resources and Support for Financial Advisors

Fiduciary Related Resources

- Summary of Fiduciary Responsibilities
  - Writing an Investment Policy Statement
  - Investment Committee Cheat Sheet
  - Calendar of Important Dates
  - 404(c) Checklist and Sample Notification Letter
- Fiduciary Audit File Checklist
  - Audit File Checklist Overview
  - Audit File Organizer
- Investment Policy Statement Template (DC, DB, Foundations & Endowments)

Financial Advisor Tools

- Fee Policy Statement Kit
- Education Policy Statement Template
- Sales and Service Planner

Fund Analytics

- fi360 Analysis
- Morningstar® Advisor Workstation℠

White Papers and Articles

- Endowment Spending Policy
- Building a Cash Flow Reserve Ladder
- The-Value-of Dividend In Retirement

Books

- How to Write an Investment Policy Statement
- Best Practices for Investment Committees

Presentations/Seminars

- Creating and Managing Longevity Oriented Investment Portfolios
- Road of Retirement: The Process of Managing Retirment Income
- CE credits approved for CFP, ChFC, CIMA, CIMC, CLU, CPA, and CRPC

CONTINUING EDUCATION CREDITS							
SEMINARS	NUMBER OF CE CREDITS AVAILABLE						
	CFP	ChFC	CIMA	CIMC	CLU	CPA	CRPC
Creating and Managing Longevity Oriented Investment Portfolios	1	1	1		1	1	1