

The TPSU Adjunct Lecturer Opportunity

TPSU maintains a faculty of authorized adjunct lecturers for their certification program. TPSU Adjunct Lecturers will provide exclusive certification training for plan sponsors across the country. Training is conducted at local universities and colleges in cooperation with TRAU™ and TPSU averaging almost 30 attendees.

TPSU's Adjunct Lecturer faculty consists of elite retirement professionals who meet specific qualifications and seek to train and certify plan sponsors in their local and regional markets. The title of TPSU Adjunct Lecturer has real meaning to plan sponsor clients, prospects, and the retirement industry as a whole. Advisors who earn the credentials distinguish themselves not only as true retirement planning experts but also as leaders in their field.

After the program, Adjunct lecturers are able to meet with an average of 90% of attending plan sponsors offering unparalleled prospecting opportunities.

TPSU Adjunct Lecturer Renewal Requirements

Following the first year of participation as a TPSU Adjunct Lecturer, participating advisors will have first right of refusal to renew their marketing license. Adjunct Lecturers should be prepared to:

1. Conduct two programs/year to retain exclusivity;
2. Remit a \$3500 deposit on or before November 1st or preceding contract year or 30 days within signing contract; and
3. Satisfy continuing education requirements annually

Benefits for TPSU Adjunct Lecturers

1. Comprehensive Adjunct Lecturer (AL) Training;
2. The credentials to self-market and serve as an Adjunct Lecturer for TPSU;
3. The right to market and conduct TPSU educational programs and certify plan sponsors;
4. The ability to offer CE credits to plan sponsor attendees;
5. Exclusive rights to market to plan sponsors in a designated territory;
6. Ongoing access to licensed, CE-approved content for plan sponsors;

TPSU Sponsor Event Marketing & Costs

TPSU will market each certification training event on behalf of and in coordination with TPSU Adjunct Lecturers using TPSU assets and an authorized TPSU event marketing service. The fee for marketing services to promote each certification training event is \$20,000/program which includes a budget of \$1500 for food, A/V and room rental. TPSU Adjunct Lecturers may opt to have their certification training event sponsored in part or whole by other industry partners.

Methods of promotion for TPSU certification training events provided by the authorized TPSU marketing service include:

- Direct email to employers in your marketing zone(s);
- Co-marketing and outreach in partnership with local associations;
- Outbound tele-recruiting;
- Direct mail – up to 75 special invites to clients, prospects and COIs;
- Daily 401kTV emails and portal; and
- Social Media (LinkedIn, Twitter & Facebook)

TPSU Training, Curriculum

The TPSU training and curriculum will be both informative and robust and will include the most essential topics of importance pertaining to improved retirement plan stewardship for business owners, benefits specialists and other employer fiduciaries. Each enrollee will attend a half-day certification training event conducted at a local college or university. Additionally, each enrollee can complete 13 online courses housed on the TPSU Portal Learning Management System, schedule to sit for and pass an online proctored examination to earn the C(k)PF designation (at no cost if completed within 6 months of the half-day classroom training). All attendees get access to TPSU’s Retirement Committee Education (TRCE) with each of the three courses carrying one hour of CE.

Core areas of study during the on-site certification training event will include:

- Improving participant outcomes;
- Understanding the roles of advisors and service providers;
- Navigating the regulatory environment and meeting DOL requirements;
- Limiting fiduciary and litigations liability;
- Plan design & compliance;
- Managing costs;
- Investment selection & monitoring especially target date funds; and
- Effectively running a Retirement Committee

Sample TPSU Agenda

BREAKFAST*	8:00-8:30
TPSU Intro (Fred)	8:30-8:50
Session 1 - TPSU Lecturer (Includes intros by all attending plan sponsors)	8:50-9:50
BREAK	9:50-10:05
Session 2 Keynote	10:05-10:50
Seesion 3 Panel	10:50-11:35
BREAK - PICK UP LUNCH	11:35-11:50
Session 4 (over lunch) Breakouts: Working/Not working	11:50-1:15
Ideal Plan & Opportunity Checklist	1:15-1:45
Closing	1:45-2:00

About TRAU®

TRAU®, The Retirement Advisor University a collaboration with UCLA Anderson School of Management Executive Education, is the first retirement planning certification program associated with a nationally recognized institution of higher learning.

Participating advisors and wholesalers can benefit by earning a certification that has real meaning to plan sponsor clients, prospects, and the retirement industry. The TRAU™ curriculum is a combination of on-site classes at the UCLA campus, virtual classroom courses (e-learning), and self-study. By combining world-class professors with retirement industry leaders, TRAU has created the most comprehensive retirement training program for financial advisors in America. Individuals attending TRAU™ are instructed by both world-class UCLA Anderson faculty members and some of the most accomplished financial advisors in the retirement plan industry.

Access to a highly skilled retirement advisor is becoming increasingly critical to the average American. TRAU™ has been designed to empower financial advisors with the skill sets they need to assist their clients' participants in retiring successfully.

About UCLA Anderson School of Management Executive Education UCLA is the #1 rated public university and is a leader in executive education since 1954, the school offers more than 40 programs, including open enrollment programs that focus on leadership, general and functional management, and strategic vision.

The Plan Sponsor University Adjunct Lecturer Board Members

- Fred Barstein, Founder & CEO
- Steff Chalk, Executive Director
- Tom Foster, Managing Director, TRAU Speakers Bureau

For more information or to apply to participate, contact fred@TPSUniversity.com, 855-755-4015 x100.