



Adjunct Lecturer OPPORTUNITY

Distinguish yourself as a *true* retirement planning expert & leader

The TPSU Adjunct Lecturer title has real meaning to plan sponsor clients, prospects, and the retirement industry as a whole. Our adjunct lecturers (ALs) consists of elite retirement professionals who meet specific qualifications and seek to train and certify plan sponsors in their local and regional markets. Become a TPSU AL to provide exclusive certification training for plan sponsors at local universities and colleges across the country.

Training, conducted in cooperation with TRAU™ and TPSU, average 30 attendees per program. After the program, ALs are able to meet with an average of 90% of attending plan sponsors offering unparalleled prospecting opportunities.

Adjunct Lecturer Benefits

1. Comprehensive AL Training and TPSU AL Credentials
2. Rights to self-market, and market and conduct TPSU educational programs
3. Exclusive rights to market to plan sponsors in a designated territory
4. Ability to offer CE credits and certify plan sponsor attendees
5. Ongoing access to licensed, CE-approved content for plan sponsors

TPSU Training Curriculum

Our training is informative and robust and includes the most essential topics pertaining to improved retirement plan stewardship for business owners, benefits specialists and other employer fiduciaries. Each enrollee attends a half-day certification training event, completes 13 online courses housed on our TPSU Learning Management System, schedules to sit for and pass an online proctored exam 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.

- 1 Comprehensive Adjunct Lecturer Training & TPSU credentials
- 2 Ability to offer CE credits to plan sponsor attendees
- 3 Exclusive rights to market to plan sponsors in a designated territory

Contact Information

4514 Main Street, Apt 1036
Jupiter, FL 33458
Registrar@trauniversity.com
855.755.4015
www.trauniversity.com

Fred Barstein

Founder & CEO
Fred@trauniversity.com

Steff C. Chalk

Executive Director
Steff@trauniversity.com

Daniel Hall

Director of Advisor Development
Dan@trauniversity.com



Core areas of study during the on-site certification training event 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
- Effectively running a Retirement Committee

Program Marketing

We market each certification training program on behalf of and in coordination with ALs using TPSU assets and our authorized TPSU event marketing service which 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
- Social Media (LinkedIn, Twitter & Facebook)

The fee for marketing services to promote each certification training program includes \$1500 for food, A/V and room rental. ALs may opt to have their certification training program sponsored in part or whole by other industry partners.

Program Pricing

Program Type	Price
In-Person Programs	\$20,000

TPSU Adjunct Lecturer Renewal Requirements

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

1. Conduct two programs a 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.

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.



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