

Why Support a TPSU Program

The Plan Sponsor University (TPSU), an affiliate of TRAU, The Retirement Advisor University (TRAU), offers the most comprehensive in-person classroom instruction combined with online training courses for Plan Fiduciaries. The Program begins with a half-day certificated session and at the attendees' option, can include a designation program for business owners, benefits specialists or other employer fiduciaries. The response to TPSU Programs, nationwide, has been universally positive from plan fiduciaries and plan trustees. TPSU training and ongoing education from a national organization like TPSU leverages local plan resources experts that make up our Adjunct Lecturer staff.

The TPSU training and curriculum is both informative and robust, covering essential topics of importance pertaining to improved retirement plan stewardship for business owners, benefits specialists and other employer fiduciaries.

Adults do not always learn by listening passively. The education experience at TPSU programs incorporates active participation for all attendees with sessions and topics that are addressed by the TPSU Adjunct Lecturer. TPSU enhances the plan sponsor learning experience by sharing information in a style similar to that used at The Retirement Advisor University, a collaboration with UCLA Anderson School of Management Executive Education.

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- ✚ TPSU is dedicated to the retirement plan industry. TPSU provides quality instruction through the Adjunct Lecturer.
- ✚ Plan Sponsors benefit from high level training – where best practices from the Defined Contribution industry are shared.
- ✚ Adjunct Lecturers are educated off-site on TPSU Program specifics, at least once per year. All Adjunct Lecturers are highly educated in retirement plan specifics.
- ✚ TPSU Adjunct Lecturers are among the most highly qualified retirement plan professionals in the country and they are carefully screened and monitored. All Adjunct Lecturers have either earned the Certified 401(k) Professional Designation or they are actively working through the coursework. TPSU Adjunct Lecturers oversee, on average \$500+ mm of Defined Contribution Assets.
- ✚ Through your support of a TPSU program, you are supporting the delivery of high quality, impactful education to your distribution partners, as well as to the plan sponsor community.
- ✚ Providers engage in meaningful and thought-provoking conversation contact with high level Advisors in preparing for each TPSU program.
- ✚ Sponsoring providers are able to speak or participate at each program depending on their level of interest.
- ✚ TPSU gives Adjunct Lecturers access to the highest level of fiduciary training in a well-rounded environment.
- ✚ TPSU offers wholesalers a unique opportunity to speak and interact with plan sponsors.

How to Support a TPSU Program

- ✚ Contact Daniel Hall, Director of Advisor Development, dan@trauniversity.com – 855 755 4015 x133

Suggested levels of support:

- ✚ **Platinum – Key Note / Solo presentation during Session 2 (\$5,000)**
- ✚ **Gold – Panelist Session 4 (\$3,500)**
- ✚ **Silver – Support program and facilitate a Session 4 Break-out w/ Plan Sponsors (\$2,000)**