



## Essential Choice™ Retirement Plan Solution

### Web-Based Sales Tool: Quick Start Guide

# THE FAST AND INTUITIVE WAY TO CREATE PROPOSALS

The *Essential Choice* web-based sales tool enables financial advisors to produce pricing proposals for the *Essential Choice* product right from their own mobile devices. This convenient, self-serve tool puts proposals at advisors' fingertips—helping to automate and shorten the sales process and close sales faster.



## 1 Log in or register

- Go to <https://essentialchoice.troweprice.com/>
- A** Log in or **B** Register (First time users will need to register)
- Your information will pre-fill going forward

**A** **T.RowePrice®**

**Launch**

Sign up  
Forgot your password?  
User receive confirmation instructions?

**B** **T.RowePrice®**

**Select a state...**



**Please choose a carrier**

**Essential Choice™**

Welcome to the Essential Choice sales tool, where T. Rowe Price is making it easier for you to sell retirement plans to small businesses.

**LOG IN OR SIGN UP NOW** to create proposals for your prospects.

[Click here to learn more](#)

## 2 Create a proposal

- A** Complete prospect information
- Advisor compensation section is optional
- Click submit

**A** **Essential Choice App - Proposal**

**Advisor Information**

\* Advisor Name

\* Title

\* Firm Name

\* Email

\* Phone #

\* Address

**Prospect Information**

\* Sponsor Name

\* Legal Plan Name

\* Plan Type

\* TPA or Bundled

\* Existing Plan or Startup Plan

\* Current Plan Assets

\* Number of Participants

\* Annual Gross Contributions

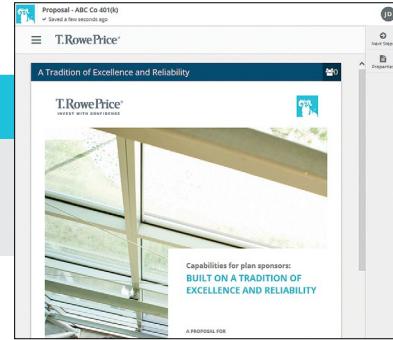
**Compensation (optional)**

Advisor Compensation Method

**Submit**

## 3 Review the proposal

- Use navigation menu or arrows to review proposal
- Includes plan fee summary and product features



## 4 Deliver to prospect

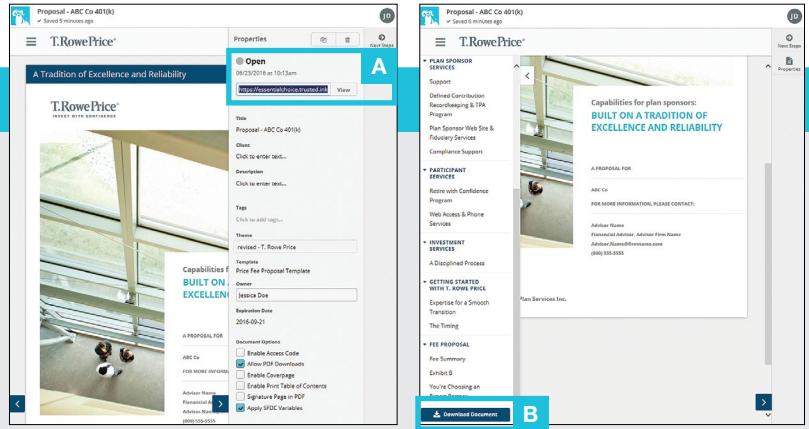
There are two options for delivery:

### A Electronic (preferred)

- Click properties
- Copy URL and paste into e-mail

### B PDF

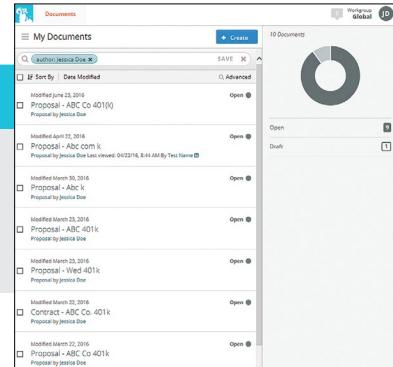
- Click Download document from menu
- Send via e-mail or print hard copy



## 5 Access your proposals

You can easily access proposals you have created:

- E-Click on the Documents tab
- Select any specific proposal to review or resend



## Get started with the *Essential Choice* product

[Click here](#) to learn more about the *Essential Choice* product and its web-based sales tool. To register to use the *Essential Choice* sales tool, go to <https://essentialchoice.troweprice.com/>. Once you create an account and log in, you can immediately start using the tool to generate proposals.

## QUESTIONS?

For more information, click to contact the [RPS sales team member](#) in your area or contact the Internal Sales Desk at 1.800.831.1370.

## ADVISOR USE ONLY