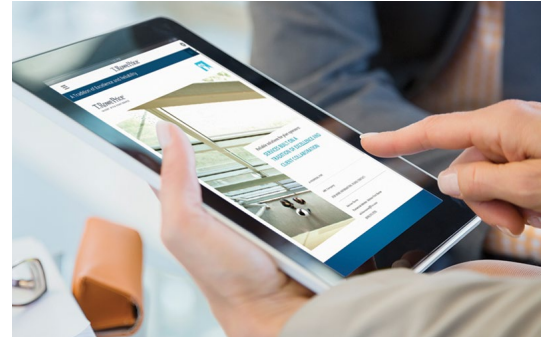




Essential ChoiceSM Retirement Plan Solution
Web-Based Sales Tool: Quick Start Guide

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.

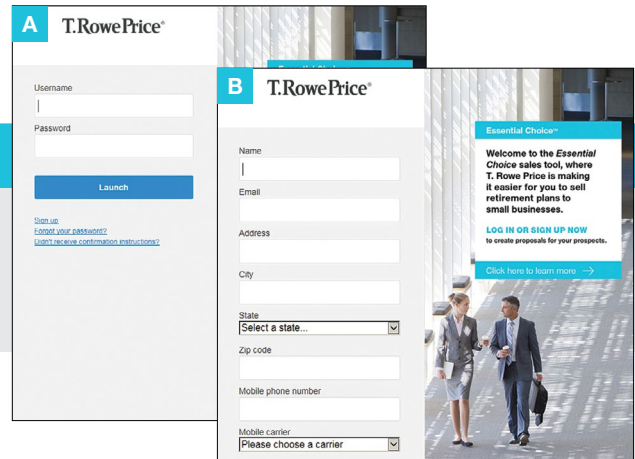


1 Log in or register

- Go to <https://essentialchoice.troweprice.com/>

A Log in or **B** Register (First time users will need to register)

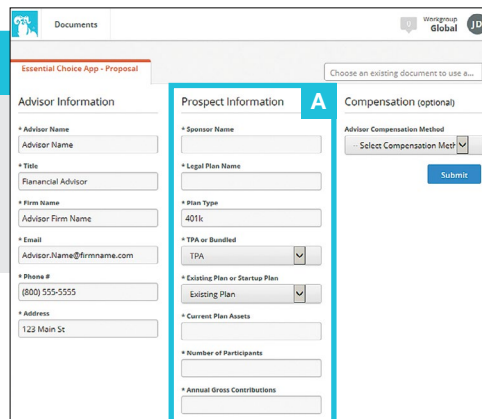
- Your information will pre-fill going forward



2 Create a proposal

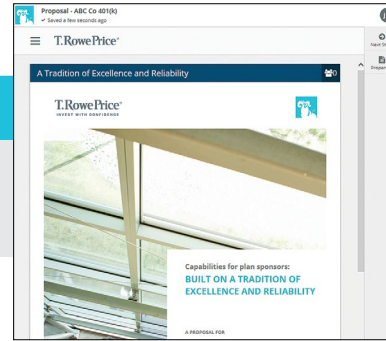
A Complete prospect information

- Advisor compensation section is optional
- Click submit



3 Review the proposal

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



4 Deliver to prospect

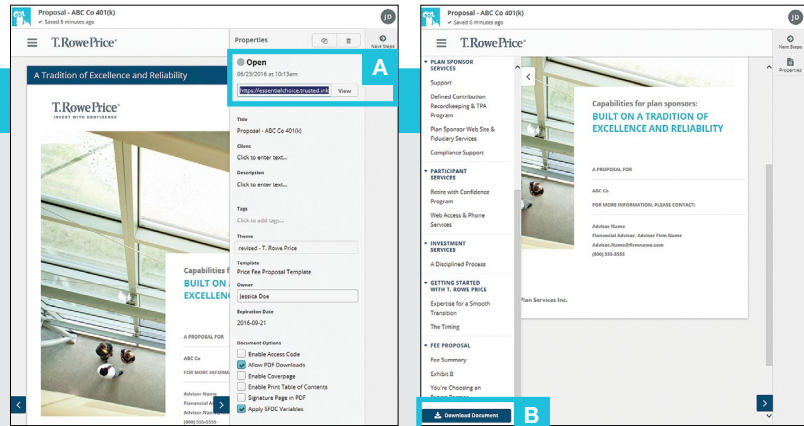
There are two options for delivery:

A Electronic (preferred)

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

B PDF

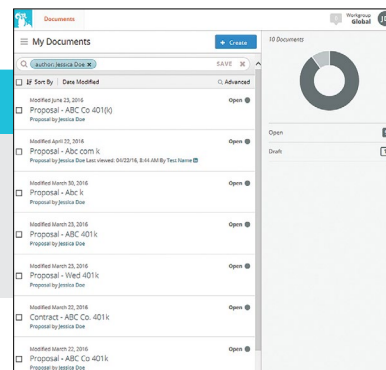
- Click Download document from menu
- Send via e-mail or print hard copy



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.