

Creating a resilient practice in times of uncertainty

"When your business strategy and management are dynamic and adaptable, you're better prepared for any situation."

- Retirement Plan Account Manager, T. Rowe Price

An efficient plan is a resilient plan.

Consolidate your retirement plan recordkeepers

Develop and deepen client relationships

Creatively share relevant communications

Building a more resilient practice: Ways to get started

Consolidate recordkeepers

Consolidate your retirement plan recordkeepers into a core group and measure utilization and effectiveness of the plans.

Maintain an optimized partner list

Have enough variety to meet the needs of specific clients, while making your business manageable...and recession resistant.

Stay connected to your clients

Communicate with your clients on timely topics in creative ways:

- Direct mail
- Newsletters
- Video updates
- Webinars
- Social media
- Blogs

T. Rowe Price offers a wide range of resources that can help you grow your practice. For more details on how you can boost the efficiency and resilience of your business:

Visit our website or contact your T. Rowe Price representative troweprice.com/ToolsforProfessionals 800-831-1370

Important Information

This material is provided for general and educational purposes only and is not intended to provide legal, tax, or investment advice.

All investments involve risk, including possible loss of principal. T. Rowe Price Investment Services, Inc.

T. Rowe Price Retirement Plan Services, Inc.

© 2024 T. Rowe Price. All Rights Reserved. T. ROWE PRICE, INVEST WITH CONFIDENCE, and the bighorn sheep design are, collectively and/or apart, trademarks or registered trademarks of T. Rowe Price Group, Inc.