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Sales Success: Become the "Go-To-Advisor" for Micro Business Qualified Plans

We've interviewed a number of advisors recently who have had success selling multiple DB plans. That means they can count on getting several hundred thousand \$\$\$ in new AUM each year almost automatically. Here are two Advisors — very different markets, very different clients, but **the same strategy works for both: [Helping local CPAs take the lead.](#)** Could it work for you?

Craig Ciarlelli, AIFA, ChFC, CLU, is a financial advisor with Cetera Advisor Networks LLC. Craig decided some time ago to focus on micro and small employers, providing Qualified and non-Qualified Solutions. Recently, he decided to leverage his relationships with local CPA firms to target clients with high income who would be great candidates for a defined benefit plan. In the past three years he brought in three of these clients, all consultants, who contribute over \$100,000 each and will as long as the plans are open. To date he has \$575,000 in AUM from these plans. [Read more about how Craig has shaped his practice to work with CPAs and support his clients.](#)



Nathan Wyatt, is an Investment Officer and Registered Rep with Securities America, Inc. in Gothenburg, Nebraska. He has built his business up to \$140 million AUM by focusing on Wealth Management and retirement plans for local farmers and other companies. He offers a full range of retirement plans from Traditional IRA, Roth, SIMPLE IRA, 401(k) and, since 2008, micro defined benefit plans. Nathan has gathered over [\\$1.6 million in three DB plans by letting the CPA take the lead.](#) [Learn more.](#)

Working with CPAs: [Download a FREE CPA Presentation](#)

We've assembled materials and training to support you as you talk to CPAs and gather referrals from them.

Use the updated the OnePersonPlus® Defined Benefit Plan PowerPoint designed specifically to present to CPAs. It focuses on helping CPAs identify high-income self-employed clients who could benefit from micro defined benefit plans — a powerful tax strategy.

With this presentation you can:

- Introduce CPAs to the OnePersonPlus DB retirement plan
- Review DB plan basics
- [Compare retirement plans and potential tax savings](#)

Quicklinks

[CPA Highlights](#)

Email to CPAs

[Present to CPAs](#)

A Tax Strategy for High Income Self-Employed and Small Businesses Owners

[Partner with CPAs](#)

Webinar on Nov. 20 @€" Register early!

[Typical DB Clients](#)

Help CPAs identify the best clients

[CE Training for CPAs](#)

We'll give you everything you need to present an accredited program

[Proposal Request Form](#)

[Set Up Questionnaire](#)

Run our **Instant Defined Benefit calculator** to see how much YOU or Your Client could save on taxes and add to retirement wealth.

► **TRY IT NOW!**

[UPDATED!](#) [CPA Sales Presentation](#)



[Order FREE Client Brochures](#)

Hand out to your clients

- [Identify ideal clients and learn where to find them](#)
- Gain goodwill as well as referrals for your advising business

[Download your presentation copy now.](#)

Build a Network of CPAs

- Introduce CPAs to the OnePersonPlus DB retirement plan
- It's easy to identify the accounting firms in your area but more difficult to differentiate yourself when you do. [Register for our webinar: Partner with CPAs to Build Your Business](#)
- Every state has a CPA association or society. Go to www.AICPA.org for contact information. Call the personal financial planning division of your state's association for specific recommendations.
- Consider getting on the agenda for a CPA conference or an association's monthly meeting.
- Contact CPAs who are teaching local college courses, or who author trade journal articles, or who currently serve your existing clients.

[Demo the Contribution and Estimated Tax Savings Online Calculator](#)

Quickly estimate the 2014 tax savings and contribution limit for your clients.

[Try it now!](#)

[Run a proposal](#) that estimates your client's:

- 2014 Income tax savings
- 2014 Maximum retirement plan contribution
- Projected annual retirement cash benefit
- Maximum contribution for a variety of retirement plan options

You get a customized estimate in a client-ready proposal that you can save as a pdf. It's free and quick to run.

Tell the CPAs you approach you'd be happy to run a complete proposal for a client they have in mind. It will take you about five minutes and you'll have a professional proposal to deliver. It's the tax savings that will say it all to the CPA and get them thinking about the right clients for this plan.

[Marketing Tools](#)

We've created marketing tools that you can use when reaching out to tax advisors.

1. [Seminar](#)

You've identified one or more CPAs whose clients may be good candidates for defined benefit plans, now use our "A Tax Strategy for High Income Self-Employed and Small Businesses Owners" presentation. Introduce the OnePersonPlus DB program and review the typical profiles of DB plan sponsors.

2. [Typical Client Profiles](#)

Download handy reference guide to typical profiles and contribution limits.

3. [CPA Highlights](#)

Email program highlights to your CPA contacts today.

4. [More Tools](#)

Visit our [Sales and Marketing page](#) for more prospecting tools.



CE Training for CPAs

[We'll give you everything you need to present an accredited program](#)

CONTACT US

For a custom proposal or questions email us at DBPlans@dedicated-db.com or call **1-866-269-2706**.

Remember, Dedicated Defined Benefit Services provides ongoing sales support and administrative services for advisors. We do not charge asset-based fees. We are here to help.

You provide the investments and money management.

Click here to email us or call 1(866)269-2706

Visit www.onepersonplus.com

Please NOTE: Defined Benefit plans must be established by the end of your client's fiscal year, generally December 31st.

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