UWAG, LLC Monthly Update

BETTER TOGETHER!

A Newsletter for Our UWAG, LLC Affiliated Agents & Advisors Issue 13 January 17, 2020

Arnie's Insights: Practice Management and Coaching

It's 2020—Where Are You Going to Find 100 Prospects?

A new year requires new approaches for filling your prospecting pipeline. *These approaches*—somenew, and some classic—that can help keep new clients coming into your door all year long.

Tech Talk

Orion Adds Tax-, Risk-Focused Integrations

Advisors using LifeYield, Totum Risk and Orion Advisor Solutions will see greater efficiency, according to the firms involved.. *Read more*

Wealth Management

Eight Trends to Impact Wealth Management in 2020

Between political instability, technological advances and the regulatory changes, there are a number of factors impacting the wealth management industry. Aite Group released their report, highlighting its top predictions for the industry. *Read more*

Are Value ETFs Returning to Favor? It Depends on the Index

Value ETFs can vary widely depending on how the index provider defines the term, as evidenced by the differences in the value and growth slices of the S&P 500 and Russell 1000 benchmarks *Read more.*

Worst bond fund returns of 2019
With corporates leading the industry's top-performing fixed income funds of 2019, it's no surprise government bonds were among the worst. *Read more*

College Funding Coach

Waiting for the big time Division I college baseball scholarship? You may be waiting for a while

Michael Cappo, Director of College Planning, shares his knowledge on how these scholarships actually work. *Read more*

Upcoming UWAG Training Call:
AIC Updates & Q&A with Mike Moss
Join this call **on January 21st @11am CT to will provide the UWAG team with updates regarding the current changes at AIC as well as the new capabilities available in 2020.**

Retirement Planning

Adviser Managed Accounts. A Good Fit?

The past few years have seen a number of recordkeepers roll out new "adviser managed accounts," i.e., managed accounts that include the consulting services of an independent registered investment adviser. *Learn more.*

Supremes Punt 'More Harm Than Good' Review

Those who had hoped for some clarity – or perhaps a shift – in the standards involving where, and how, to draw the line between the obligations of corporate officials and ERISA plan fiduciaries – will have to wait a little longer. *Learn more*

Keeping Defaulted Participants on the Right Path

In this Morningstar paper, explore how key characteristics of a plan's default target-date fund may impact a participant's decisions to accept and remain in a default investment. *Read more*

Financial Planning

2020 Retirement Calendar and Checklist—A Great Conversation Starter

With the passage of the SECURE Act, this year communication will be more important than ever. *Here's a round up the important dates and tasks* clients need to be aware of in retirement.

2020 Key Financial Data
Inspire confidence in clients, prospects, and centers-of-influence (COIs) with t*his reference card* that lists all the key number that could effect their financial plan in 2020.

The CFP Board to Enhance Scrutiny of Advisor Records

The CFP Board said it would increase the frequency of how often it checks advisors for regulatory infractions, following revelations it failed to note the marks on public facing sites touting the credentials of thousands. *Read more*

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Sales & Marketing Ideas

Ten Tips for Preparing for a Prospect Meeting

Getting ready for a big meeting with a potential client? Preparation matters. *These 10 Tips* will help get you prepared.

Q1 Workshop Idea: 2020 Medicare Changes

This is a *customizable client education presentation* to give to your clients or prospects. You can deliver it as a workshop or seminar, or in a smaller setting, even one-on-one. Use this *Medicare Enrollment Planning Flowchart* to start the conversation.

Client Communication
Reach out to your clients with *this letter* to discuss how to embrace market volatility in 2020 as well as understand how truly remarkable the final outcome of the 2019 market.

The SECURE Act: Are You Talking To Your Clients About this News??

Touch base with them using these letters:

A 2020 Look a Your IRA

Rules Tighten on Stretch IRAs

Let them know that you have your eye on these developments, and what they may mean for consumers. You can edit the letter or send it as-is, as you like.

Insure Your Love Social Media Campaign
LifeHappens newest Insure Your Love (IYL) campaign resources and how to capitalize on the evergreen campaign them "A Promise Kept" all through the month of February and beyond.
Download them here!

AIC Reminders

NEW DISCLOSURES

A new Disclosure Guide (AIC 1290) has been created for the field to provide instructions for updating disclosures due to the AIC entity restructure. If you need any assistance updating your social media profiles and marketing materials, please contact Jenn Verges.

Wealth Management Training Sessions

If you haven't been able to attend, you can access the recordings in the AIC Teleconference Replays area on Producer Workbench using the following path: Learning Center>For AIC Representatives>Teleconference Replays under the On-Demand Training heading>AIC Teleconference Replays

Ameritas Reminders

2020 Development Schedule

Here is the 2020 Education and Development meetings calendar. View now.

2020 Tax Tables Available

The 2020 Tax Tables provide you with a quick reference to answer clients' questions about tax deductions and limits. View now.

Highlights of the SECURE ACT

Read about the Setting Every Community Up for Retirement Enhancement (SECURE) Act of 2019 and its implications for your clients.

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Issues of "Better Together" are archived at www.uwagllc.com/for-advisors. You will also find useful marketing and client communication tools, UWAG processes and weekly market updates. New pieces are added weekly to help you develop your business. ***PIN 8507***