

Direct to Plan Consulting

GOALPATH'S "DO IT FOR ME" MODEL TO SERVE YOUR RETIREMENT PLAN CUSTOMERS

GoalPath's Direct to Plan Consulting is a great opportunity for Sanctuary advisors who specialize in areas outside of qualified retirement plans. When you refer a client to GoalPath, they get a best-in-class experience while you earn referral income. And when we identify individual investors in these plans that need advanced planning services, we direct these opportunities right back to you. It's a "do it for me" service that produces better outcomes.

Instead of staffing up and educating your own team on the esoteric details of the qualified plan space, lean on our expertise to compete and win more business. More importantly, have your most valued clients serviced by a team who always has your back.

How It Works:

1

You introduce GoalPath as your retirement plan specialist team and we consult directly with the prospect/client.

2

We share in a referral fee and you stay involved to serve individual investors in the plan who may need Advanced Planning. We actively listen for these opportunities and refer them back to you.

The GoalPath team does the heavy lifting:

- + Direct to Plan Consulting
- + Serving the Client
- + Meeting with Participants
- + Meeting with the Committee
- + Meeting Minutes
- + Plan Benchmarking
- + Delivering Fiduciary Plan Reviews

BEST FIT Advisors who specialize in:

- + Wealth Management
- + Tax Planning
- + Estate Planning
- + Executive Planning