MFS®
INVESTMENT MANAGEMENT
CHOOSE WHAT FITS.®

Move your retirement plan business forward

with Advanced (k)℠ from MFS®

Advanced (k)℠ integrates innovative strategies and powerful content, enabling you to attract new clients, build rewarding relationships, and grow your retirement plan practice.

MFS is proud to be partnering with Ann Schleck & Co. to deliver Advanced (k), our comprehensive program that can help you excel at communicating with and managing your plan sponsor clients.

Learn about critical client management and retention tools while leveraging the latest industrywide best practices.

Strategic relationship management and client retention tools to deliver added value

Advanced (k) features three modules, as detailed below. Each module offers a number of impactful tools, including detailed PowerPoint presentations, easy-to-follow playbooks/toolkits, client-ready templates, and customized reports and analyses.

1. **Benchmarking financial advisor fees and services**
   Resources to educate you on fee norms and services and tools to demonstrate your value to clients.
2. **Managing strategic client relationships**
   A client-needs analysis and broad annual relationship plan to help you effectively manage and retain your plan sponsor clients.
3. **Building a differentiating pitchbook**
   Tips and tools to help you develop a compelling finals presentation that separates you from the competition.

Together, these tools will enable you to focus on the issues most relevant to your retirement plan practice and thereby create tangible results for your clients.

A collaboration of two retirement industry leaders

Advanced (k) combines the expertise and support of MFS with the strategies, tools, and resources of third-party retirement industry expert Ann Schleck & Co.

MFS, with more than 87 years of experience working with financial advisors, has a history of investment management leadership and a dedicated Defined Contribution group committed to growing your retirement business.

We can help position you as a retirement plan specialist with access to industry thought leadership, a broad range of investment strategies and business-building and analytical resources.

Start building stronger client relationships today. Integrate Advanced (k) into your retirement plan practice by contacting MFS' DC investment specialists at **1-800-637-8730**.

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MFSB-ADVKMFS-FLY-4/11
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