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Execute a Foolproof Retirement Plan Advisor RFP

Sit back, relax, and watch our webinar on how to conduct a foolproof retirement plan advisor request for proposal (RFP).

Whether you're benchmarking your current advisor, requesting general information, or conducting a formal retirement plan advisor RFP, this webinar recording will help you understand and implement the fundamentals of a sound RFP process.

During this webinar, you'll hear from CAPTRUST leadership as they cover best practices and discuss real case studies from their experience completing more than 2,000 RFPs. We will share valuable tips and tricks around the preparation, implementation, and decision-making steps that go into completing an advisor RFP.

Additional Resources

- [Position Paper on Conducting an Effective Advisor RFP Process](#)
- [Retirement Advisor Council \(RAC\) RFP Template](#)
- [Department of Labor \(DOL\) Tips for Plan Fiduciaries for Selecting and Monitoring Pension Consultants](#)

- [Advisor RFP Deliverable Structure](#)
- [Advisor RFP Sections and Topics](#)

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