



Advisor RFPs: The Ultimate Guide (Webinar Recording)

Having responded to more than 3,500 RFPs and helped create the industry-standard RFP response template, the CAPTRUST team is well-positioned to help you optimize the RFP process from beginning to end. In this webinar recording, we present a step-by-step guide to aid you in planning, preparing, and executing on this important body of work. We also discuss:

- Advisor RFP best practices
- Recent legislation and technologies impacting the retirement industry
- Questions plan sponsors should be asking based on their plan type(s)
- Topics that are top of mind for retirement plan sponsors today

Additional Resources

[Webinar Presentation Deck](#)

[Industry Standard RFP Advisor Search Template](#)

[Selecting and Monitoring Pension Consultants](#)

To download a copy of the transcript, [click here](#).