CAPTRUST

Advisor RFPs: The Ultimate Guide (Webinar Recording)

With a history of responding to more than 3,500 RFPs and having helped shape the industry's standard response template, the CAPTRUST team is uniquely qualified to help you streamline this process. In this recorded webinar, we provide a comprehensive, step-by-step framework to help you plan, prepare, and successfully execute this important task. The discussion also covers:

Best practices for advisor RFPs

- The influence of recent legislation and new technologies on the retirement sector
- Key questions plan sponsors should consider based on their specific plan types
- Current and pressing topics 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.

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