

What you get when you work with us.

Our comprehensive client prep services allow you to do more with less work.



PRELIMINARY SERVICE ITEMS: • Preferences and Agenda Structure • Box folder and template structure • Ameriprise Resource List

| <p>eMeeting ESSENTIALS Prep Meeting Essentials Prep</p> <p>\$20 per case*</p> | <p>eMeeting FULL Prep Essential Plus Additional Reports</p> <p>\$35 per case*</p> | <p>Client Meeting Coordinator Bringing your client meeting prep to life!</p> <p>\$1,000 per month</p> |
|---|---|---|
| <p>WHAT WE DO</p> <ul style="list-style-type: none"> • Gather your eMeeting preferences • Complete eMeeting steps to generate a presentation • Provide you with an advisor facing Themed-Meeting templated agenda • Upload prep items into your Ameriprise Box and/or CRM Workplace for you to utilize <p>WHAT YOU GET</p> <ul style="list-style-type: none"> • eMeeting presentation suitable to your preferences • Themed Meeting Advisor Agenda Template | <p>WHAT WE DO</p> <ul style="list-style-type: none"> • Gather your eMeeting preferences • Complete eMeeting steps to generate a presentation • Provide additional reports in PDF or embedded into presentation (according to preferences) <ul style="list-style-type: none"> - Client Viewer Reports - Annuity & Insurance Detail Reports - Investment Details - Total View Information - Portfolio Management Tool (PMT) - Morningstar Snapshot Reports (AMPF Assets) - NaviPlan Fact Finder (Comprehensive & Foundational) - Thomson One Reports • Provide you with an advisor facing Themed-Meeting templated agenda • Upload prep items into your Ameriprise Box and/or CRM Workplace for you to utilize <p>WHAT YOU GET</p> <ul style="list-style-type: none"> • eMeeting presentation suitable to your preferences • Themed Meeting Advisor Agenda Template • PDF or imbedded eMeeting reports | <p>WHAT WE DO</p> <ul style="list-style-type: none"> • Preliminary review and data collection <ul style="list-style-type: none"> - Themed Meeting Agenda preferences - eMeetings presentation preferences - Opportunity and Investment Philosophy preferences • Customize eMeetings content • Customize Advisor Facing Themed Meeting Agenda • Detailed opportunity review (Advice, Investments, Insurance) • Additional Meeting Prep Options <ul style="list-style-type: none"> - 9 Circles - Customized Insurance Illustrations - Social Security Analyzer - Retirement Interactive Data - Forefield Advisor Data - Inherited RMD Calculation <p>WHAT YOU GET</p> <ul style="list-style-type: none"> • 1 Hour weekly meeting with KMG Client Meeting Coordinator • Automated connections with expert resources for opportunities • Customized eMeetings presentation • Advisor Agenda with opportunities • Additional Meeting prep items (above) |

*KMG Client Meeting Preparation clients pay a standard rate of \$25 for eMeeting Services through Ameriprise

eMeetings Value Analysis

Doing it In-House Versus Outsourcing with KMG



The Sunk Costs of eMeeting

| Your Practice Numbers | |
|---|--|
| Clients > than 100K in AUM | |
| Number of meetings each week | |
| Employee hourly cost (e.g. \$20/hr) | |
| Time to prep for each meeting (e.g. 30 minutes) | |
| Work Weeks (48 weeks standard) | |

The difference KMG made was stark. Everything is scheduled, there's a process, and there's a customizable client experience. Thanks to KMG we are now much better financial planners today than before. The value that the client receives is high level. Because of that and because we are providing great value and quality, we are not shy about what we charge clients.

- John Everson, The Myrias Group

Annual Value Comparison of Doing It Yourself Versus Hiring KMG

| DIY Meeting Prep Keeping It In-House | | KMG Outsourced Essential Meeting Prep | | KMG Outsourced Full Meeting Prep | |
|---|--|--|--|-------------------------------------|--|
| eMeetings Tool (Paid to AMPF) | | eMeetings Tool (Paid to AMPF) | | eMeetings Tool (Paid to AMPF) | |
| Meeting Prep Employment Cost | | Essential Prep (Paid to KMG) | | Full Prep (Paid to KMG) | |
| Total Cost | | Total Cost | | Total Cost | |

KEY DRAWBACKS

- Advisor may be spending too much time on meeting prep
- High value staff are not put to their best use
- Scaling may require hiring of additional staff
- Do not receive preferred KMG rate for eMeetings tool through Ameriprise

WHAT YOU GET

- Receive KMG preferred eMeetings tool discounted rate
- eMeeting presentation suitable to your preferences
- Themed Meeting Advisor Agenda Template

WHAT YOU GET

- Receive KMG preferred eMeetings tool discounted rate
- eMeeting presentation suitable to your preferences
- Themed Meeting Advisor Agenda Template
- **PDF or imbedded eMeeting reports**

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