

CENTER FOR DUE DILIGENCE

P.O. Box 8 • Western Springs, Illinois 60558
(630) 662-0284 • Fax (630) 662-0286

E-mail: CFDD@TheCFDD.com

Web: <http://www.TheCFDD.com>

Date: March 29, 2010

Subject: **CONVERGENCE OF RETIREMENT PLAN ISSUES & NEW MEDIA**

ISSUES, NEEDS & SOLUTIONS

The retirement plans industry is buzzing over the proposed Investment Advice & Disclosure Regulations, new Form 5500 Schedule C fee disclosure and to a lesser extent, retirement income issues. Surrogate manipulation of 401(k) plan rating blogs and fiduciary models continues as well. The timing of the CFDD's October 6-8, 2010 Advisor Conference is excellent for a thorough discussion of these industry changing issues.

Given that **media and advertising have already converged**, the somewhat lethargic retirement plans industry is currently behind the new media learning curve. As a result, the timing is also ideal for a thorough discussion of *NEW AGE MARKETING: What Worked In The Past Is No Longer Effective*, the theme of CFDD '10. Indeed, combining revolutionary regulations and evolutionary media with a 50s theme would give Elvis Presley something to sing about.

While the need for professionalism, continuing education and a high skill set is essential in any mature industry, the CFDD has long noted that "specialists" don't really benefit from awards or recycled exposure in trade publications from a sales standpoint. Contributing to contemporary topics in venues with prospect exposure is, however, a different matter.

While success requires **technical proficiency and new business development, they are very different skills**. Unfortunately, many skilled advisors who are loyal to ERISA's high standards lack sales and marketing skills. As a result, a meaningful number of advisors populating the ever growing number of lists that rank the most successful/influential are struggling.

To monetize their skill set and commitment to ERISA, specialists need prospects, activity and conversions. Consistent with our DNA, **the CFDD will give advisors exactly what they want and need.**

THE PATH TO GROWTH: ADAPT & EVOLVE

Recognized as the "King of Content," advisors continue to flock to the CFDD's Advisor Conference. This in turn makes the conference circuit very productive for vendors who attend the "right" conferences (those attended by their customers), send sociable people and develop a proactive outreach strategy in advance.

While few exhibitors employ any type of conference strategy, the savvy meet with 75-100 different advisors each event day and **leverage our complimentary advertising as well as our new media interviews**. In other words, those who have figured it out are practicing both smart and cost effective marketing. Contrastingly, **those who have cut back on their outreach initiatives are not getting their share of the recovery**.

While the CFDD is widely recognized as the premiere conference for retirement plan advisors, that mantle is no longer singularly sufficient. The CFDD's Advisor Conference continues to offer unmatched networking opportunities that remain essential to advisors and vendors. To leverage those opportunities and facilitate client growth, **the CFDD is aggressively expanding their marketing footprint**.

HARNESSING THE NEW MEDIA

To add value, distinguish the CFDD and help our clients grow their business, we are aligning with internet broadcasting platforms and other new media strategy providers. Our goal is to **HEIGHTEN VENDOR VISIBILITY, POSITION RETIREMENT PLAN SPECIALISTS AS EXPERTS AND INCREASE EXPOSURE TO PROSPECTS THROUGH PULL MARKETING**.

As the CFDD evolves into **A MARKETING PLATFORM TO FUEL CLIENT GROWTH**, we **are launching an innovative menu of new media marketing services**. These unique, high value, convenient, cost effective and multi-purpose services are exclusive to CFDD clients and include:

- Internet Broadcasting Station Devoted To Retirement Plans Content
 - Template For Advisor Hosted Internet Broadcasting Shows
 - Onsite CFDD Advisor Conference Video Interviews
 - Fully Produced Business Development Videos
 - Video Leveraged Click Through Email Marketing Programs
 - Prospect Database Consulting
 - Virtual Exhibit Hall
-

INTERNET BROADCASTING

Internet broadcasting is a high value and low cost marketing strategy with huge potential. As a bonus, **speakers on the CFDD's Advisor Conference Agenda and exhibitor representatives will be interviewed at no cost by *The CFDD Station***, an upcoming internet broadcasting radio station devoted exclusively to retirement plans content. **CFDD clients may also take advantage of this opportunity and purchase interview time for a nominal fee.**

The audio interviews will be hosted and aired 24/7 on *The CFDD Station*. Each interview will open to a dedicated web page with a photo, bio and URL link. To broaden the audience, the descriptive written content is designed to optimize and drive search engine traffic to each interview. As an added bonus, the online content will be dated and remain archived and accessible on the station.

In addition to encouraging others to listen to their interview, participating clients benefit from **constant pre-existing online traffic that is powered by multiple portals, stations, channels, shows, advertising and syndication**. To generate even more traffic, the media is cross-linked and promoted from within the broadcasting platform as well as from the channels on *The CFDD Station*, i.e., Conference (Exhibitors & Speakers), Expert Advisors, Content, EAE, Resource Contributors, etc.

Our alliance partners will be onsite at the CFDD's Advisor Conference to conduct and record pre-orchestrated video interviews for those who wish to add a video component to their dedicated internet broadcasting web page. For cross promotion purposes, the audio interviews are retirement plans content specific while the video would ideally showcase the client and/or their group, practice or firm.

To generate leads and motivate key individuals to open their rolodex through viral marketing, we have developed a *Local Business Leaders* template for advisors who wish to host their own show. After an initial interview with the advisor host, **the *Local Business Leaders* strategy positions the advisor as an expert and provides them with a broadcasting platform to interview other local experts**, i.e., CEOs, business owners, attorneys, CPAs, doctors, human resource executives, not-for-profit officials, etc., in their geographic area.

To ensure professional and highly effective interviews, our internet broadcasting partner will provide high value coaching as part of their packaged services. We will also provide complimentary guidance on compliance related issues.

In summary, *The CFDD Station* is an exclusive internet broadcasting station populated by retirement plan experts. Meaningful content is always in demand and to maintain high standards, the CFDD will control and manage all station content. As noted, audio interviews and enhanced video postings are exclusive to CFDD clients, i.e., speakers, exhibitors, sponsors, conference attendees, EAE users, resource contributors, etc.

If you are a CFDD Advisor Conference speaker and or an exhibitor, you may participate in a *CFDD Station* interview without cost. To position alongside a *Who's Who* of recognized industry experts, **CFDD clients may also purchase 38 minutes of interview time (four 7-10 minute episodes) for \$199.** To enhance presence, business development videos and presentations may also be uploaded. To take advantage of this exclusive opportunity, email CFDD@TheCFDD.com. To visit the CFDD Internet Broadcasting Station, go directly to : http://www.bmbc.tv/CFDD_Station.html

In addition to positioning advisors as experts, **internet broadcasting will play a major role in our efforts to market the EAE program** direct to plan sponsors, business owners, CEOs, human resource executives, ERISA attorneys, CPAs and other centers of influence.

BUSINESS DEVELOPMENT VIDEOS & EMAIL MARKETING CAMPAIGNS

Independent of *The CFDD Station* and our new Virtual Exhibit Hall for the Advisor Conference, **the CFDD has formed an alliance to offer advisors highly valuable cutting edge new media marketing services.**

As markets mature, increased market share goes to those who can **communicate their value quickly** and effectively as well as **establish credibility**. Increased market share is also dependent on consistently **reaching more prospects.**

The CFDD's innovative new media solutions are designed to replace ineffective and expensive traditional marketing approaches with faster, less expensive and more effective online solutions to identify/convert new business prospects.

Videos have changed the internet. Indeed, prospects are far more likely to play a video than read website content. Videos also increase memory retention, brand awareness and shorten the sales cycle. In addition to building credibility, **the customized videos are designed to be your virtual representative on the web and in your email marketing campaign.**

To identify prospects who are interested, **the business development videos are designed to be used in conjunction with ongoing email campaigns.** After targeting specific prospects, the email messages are designed to enhance the message delivered by the business development video.

Response tracking and reporting identifies prospects who view the video as well as the viewing frequency. These interested prospects are **flagged and automatically receive a "call to action" email message that primes them for your personal sales call.**

While many advisors have their own database of prospects, our alliance partner will help advisors define their prospects. In addition to identifying list sources, **each list will be reviewed and tested before being acquired.**

As a bonus to conference attendees, **our alliance partners will be onsite at the CFDD's Advisor Conference to videotape risk free interviews that could be incorporated into the business development videos, posted to the dedicated internet broadcasting page or used for other independent marketing purposes.**

To take advantage of the opportunities offered by internet broadcasting, produce business development videos and launch your own video leveraged email marketing campaign, please visit the New Media Marketing and Internet Broadcasting tabs located on the navigation bar at the top of the CFDD's email newsletter and on our website at: <http://www.thecfdd.com>.

VIRTUAL EXHIBIT HALL

In addition to our internet broadcasting and new media marketing initiatives, the CFDD 2010 Advisor Conference will include an online Virtual Exhibit Hall. In lieu of a booth number, **a map of the virtual exhibit hall will showcase each exhibitor's name and a link to their audio interviews.**

The optional Profile Page (value proposition, wraparound events, links, attendee bios & individual contact information) and Business Development Videos will be posted in the virtual exhibit hall. The business development videos may also be posted to *The CFDD Internet Broadcasting Station*.

The Virtual Exhibit Hall content will remain archived until the next conference while *The CFDD Station* content will remain archived permanently. Participating exhibitors may also use the business development videos and audio interviews for their own independent marketing purposes.

These innovative enhancements increase exposure by allowing attendees and others to **cyber visit with conference sponsors, exhibitors & speakers before and after the CFDD's advisor conference.**

CFDD '10 AGENDA COMPLETE

The last open slot on the 2010 Advisor Conference agenda is now filled. Susan Mangiero (President & CEO, Investment Governance) will present *Holistic Risk Management: Best Practices For Sponsors, Providers & Consultants*.

Investment Governance (formerly Pension Governance) is an independent research, analysis and training company. The firm recently launched **FiduciaryXSM** – a new research, education, data and business network portal for institutional investors and their service providers. For a one time **FREE 90 day trial**, CFDD clients should email sale@InvestmentGovernance.com.

For additional information, visit: www.InvestmentGovernance.com, www.FiduciaryX.com and www.PensionRiskMatters.com.

CFDD 2010 ADVISOR CONFERENCE: The Fonz Lives

The CFDD's October 6-8 (Wednesday-Friday), 2010 Advisor Conference, *NEW AGE MARKETING: What Worked In The Past Is No Longer Effective*, will return to the downtown Chicago Fairmont - Millennium Park Hotel, Chicago, Illinois.

Given the evolving decision making process, the retirement industry must adapt to the new environment to maintain and increase market share. The CFDD's sole purpose centers on **helping specialists grow their retirement plans business and professionalizing the advisor selection process**. Given our mission, the new ERISA Advisor Evaluator program for plan sponsors will play a key role in the consolidation of retirement plan advisory services.

While CFDD '09 was another homerun, CFDD '10 is designed more intimately to facilitate deeper networking and enhanced learning. Specific education tracks will be threaded throughout the event and more advisor roundtables will be included in the program, including spirited after hour meetings.

The CFDD's conferences sell out early and **more than 1,000 retirement plan experts will attend the 2010 Advisor Conference, including more than 500 accomplished retirement plan advisors**.

To bridge the conference's educational demands and create a relaxed atmosphere, **CFDD '10 will feature a lively 50's theme**, including an Elvis impersonator, professional entertainers, a Grand Prize Trip To Graceland for two and major photo-ops for sponsors. In addition to authentic 50's His & Her Attire Awards, the Kick-Off Party will feature hula hoop, twist and Fonz look-a-like contests. The '57 Chevy may be no more than a ghost, but cats & chicks can still roll up t-shirt sleeves, don retro sunglasses, poodle skirts, pony tails, ducktails and network in a friendly environment.

The Chicago Fairmont's exhibitor space is limited to sixty exhibition booths and while less than twenty are left, all booth locations are equally traffic friendly. To facilitate increased networking, **all food and beverage will be served in the exhibition area**.

As a bonus, **the 2010 exhibition package includes complimentary advertising on the CFDD's website and in our email newsletter with a value up to \$25,000.** The website is currently experiencing more than 300,000 page visits per month and our newsletter reaches a highly targeted audience of over 35,000 retirement plan professionals.

The CFDD already offers more value, unbiased content, CE credits and attracts more accomplished retirement plan advisors than any other industry event. To add even more value, **join exhibitors who register early and benefit from banner ad exposure on the CFDD's entire website and our email newsletter for up to one year without additional cost.**

Our limited 2010 booth space will sell out early. To secure your space now, **benefit from extended complimentary advertising and exposure to the industry's most powerful database of retirement plan specialists**, exhibitors should click [HERE](#) to register.

Rather than continue to offer selective group discounts to large organizations, we are donning our Robin Hood hats and making the discounts available to all individual advisor registrants. **To benefit from the maximum discount, you must register early.** To register early and save, individual advisors should click [HERE](#)

For more information on the conference, visit: <http://www.thecfdd.com/CFDDconference2010>.

©Copyright 2010. All rights reserved. Center for Due Diligence. This release is published exclusively for the trade as general information and should not be viewed as a recommendation to buy or sell securities, other investments or to adopt any investment strategy. This material should also not be viewed as a forecast as CFDD opinions are influenced by marketplace dynamics and subject to change. The CFDD is not a law, advisory or investment firm. We do not give legal, tax, investment or any other type of advice. The CFDD does not warrant and is not responsible for the accuracy of content, errors or omissions. All investments involve risk. Reliance upon information in this material is at the sole discretion of the reader. The CFDD is an information & strategic resources firm serving retirement plan advisors. The CFDD also hosts the industry's largest conference for retirement plan advisors. The CFDD's October 6-8, 2010 Advisor Conference will be held at the downtown Chicago Fairmont Hotel. For more information about our publications, conferences and advertising opportunities, contact: CFDD, PO Box 8, Western Springs, IL 60558. We can be reached by phone at (630) 662-0284, by fax at (630) 662-0286 and by email at CFDD@TheCFDD.com. You may also visit our website for more information at: <http://www.thecfdd.com>.
