



WIN THE MOMENT **Tools for Growth**

COMPONENTS OF SUCCESSFUL PLAN	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
<p>NEW! Coming Soon! EDUCATIONAL INFOGRAPHIC SERIES Provide timely, relatable, content to members based on the forecasting of annual trending topics and where the current economic/medical landscape is taking us today.</p> <p>MEDIA INCLUDED: Social Media, Website Ads & Copy, Email Templates, Newsletter/Blog Copy & Infographics</p>	Diversification Retiring During Uncertain Times	Life Insurance 401(K) Rollover in Today's Environment	Guaranteed Income Managed Money	Tax Planning Inheritance
<p>TIMELY TACTICAL TOOLS Program Campaigns home page MEDIA INCLUDED: Emails, Website Banners, Statement Stuffers, Tip Sheet and FAQs</p>	<p>401(k) Rollover Maturing CDs COMING SOON: Financial Checkup/2nd Opinion</p>			
<p>MEMBER-FACING WEBINARS and promotion materials</p>	How to Weather a Bear Market	401(k) Rollover - Asset Allocation & Diversification	Income for Life Road to Retirement	Leaving a Legacy/ Wealth Transfer
<p>MARKET UPDATES & INSIGHTS Share Scott D Knapp, Chief Market Strategist, CUNA Mutual Financial Advisors and other updates from our product partners to help you educate and advise your members during volatile markets.</p> <p>MEDIA INCLUDED: Social, Web, Letters, Videos and more</p>	<p>Scott Knapp Market Updates Watch, Listen or Link – Latest Market Insights Product Partner Market Insights Market Volatility Member Communication page</p>			
<p>CU STAFF ENGAGEMENT & REFERRAL DEVELOPMENT Staff Education Series and Referral Center</p>	Referral Communication Plan to Staff <small>(in remote environment)</small>	Crump Referral Tool Putnam Advisor Training	AIG Referral Savvy	Pacific Life LinkedIn "Triggers" Training

