

Sales Note: DOL Releases New Retirement Plan Prospecting Tool

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The Form 5500 contains great information to help advisors prospect new retirement plan business. The Department of Labor (DOL) recently released their own Form 5500 search engine. The DOL Form 5500 search engine has two advantages over other 5500 search engines. The DOL search engine provides more information than is available from other 5500 search engines and the data is more recent. In fact, updated plan data is available within hours of the sponsor filing the current year's 5500.

Reviewing recent Form 5500 data before meeting with the prospective clients demonstrates your thoroughness and focus on the client's unique situation.

Give it a try: www.efast.dol.gov/portal/app/disseminate?execution=e2s1

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