REBECCA HOURIHAN

AIF, PPC

. . . **addicted to** marketing and design

. . . clients include many **award-winning firms**

. . . **keynote** speaker and author

401(k) Marketing was founded in 2014 with the mission of empowering retirement plan professionals with quality marketing materials that inspires Americans to become financially prepared for their future.

As the leading marketing agency in the retirement plan space, we are proud to help our clients share their stories through business development strategies, custom engagements, sales materials and marketing campaigns while supporting them with thought-leadership consulting, interactive workshops and speaking events.

As the founder of 401(k) Marketing, Rebecca Hourihan is a specialist in the qualified plan marketplace and thoroughly passionate about marketing and design. Prior to 401(k) Marketing, Rebecca was the east region manager at LPL Financial where she consulted with large institutional retirement plan offices on business development, client acquisition and prudent plan governance. Many of her clients included PLANADVISOR Top 100 firms. Before LPL, she spent two years on the Guardian Retirement Services sales desk consistently involved in plan sales, transitions, advisor relations and TPA coordination. And prior to GRS, she was an advisor selling qualified plans.

Rebecca is a graduate of Northeastern University with a Bachelor of Science in Economics. With over 15 years of retirement plan experience and an addiction to marketing, Rebecca has quickly become a recognized authority on marketing within the qualified plan industry. Because of this, Rebecca now takes on the role of expert keynote speaker and author in addition to running 401(k) Marketing. She has spoken at Fi360, Excel 401(k) Conference, TRAU Master Class, Retirement Symposiums, NAPA Summit and many other retirement plan conferences. She is a guest columnist for NAPA.net Magazine and 401(k) Specialist Magazine and has been featured on the Retireholi(k)s, 401(k) Specialist, InvestmentNews, NIPA, 401(k) Study Group, The Advisor's Newsletter and the Journal of Financial Planning. Her credentials include Accredited Investment Fiduciary (AIF) and Professional Plan Consultant (PPC) through the Center for Fiduciary Studies.

Rebecca's personality is naturally enthusiastic and attracts fun, hard-working and ethical professionals. She lives in sunny San Diego with her family and corgi, Lola. Her hobbies include cooking, eating, drinking wine, yoga, reading and traveling.

TOP REQUESTED PRESENTATIONS

Build a Brand Workshop

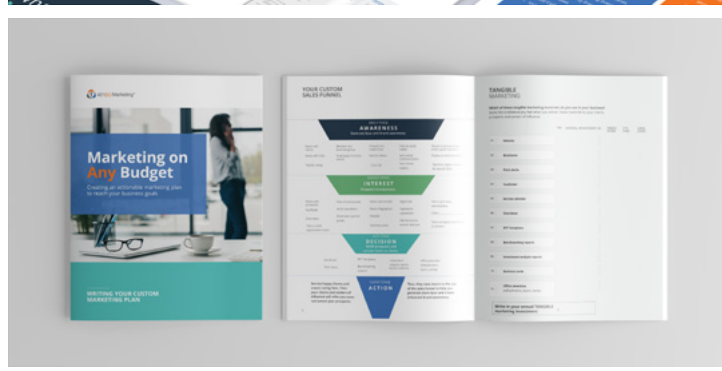
Part of the retirement plan industry is selling yourself and the trusted professional relationships that guide a 401(k) plan, its sponsor and its participants to retirement savings confidence. Ensure your personal brand is on point so it backs up the value you bring to the table. From psychology to awareness and even how color fits with your personal and professional style, this workshop will leave you with a toolbox for confident retirement plan selling.

60 MINUTES
CE ELIGIBLE

Marketing on any Budget

Come learn how you can grow your retirement plan advisory practice on any budget. From tiny spends to seven figure investments. Think like a business owner and learn how to invest in your business to get the results you desire. As always, it's an interactive session, so come prepared. All attendees will walk away with an actionable marketing plan based on your specific budget that will help you reach your business goals.

60 MINUTES
CE ELIGIBLE



TOP REQUESTED PRESENTATIONS

100 Points of Marketing

Earn Your Marketing PhD! Challenge your marketing skills and learn how to enhance your marketing through a highly interactive exercise designed to assess your brand authority, retirement plan services and ongoing content. Walk away with a marketing diagnostic of your business, as well as specific pinpoint action items to enhance your 401(k) business. All attendees will receive a custom marketing analysis with a score to help them focus on action items that strive to increase their local authority, influence and overall business growth.

60 MINUTES
CE ELIGIBLE

Influence to Inbound

Learn How Content Marketing Is the New Key to Business Success. Who actually enjoys robo calls, spam emails and unsolicited sales pitches? No one, right? The days of interruption marketing are dwindling, which is why marketing techniques have had to evolve. Learn how you can use content marketing to build an effective SEO strategy to rank your website on the first page of Google, leverage technology and automatization to drive inbound qualified 401(k) leads and demonstrate that you are an authority in the retirement plan profession.

60 MINUTES
CE ELIGIBLE

TOP REQUESTED
PRESENTATIONS

Mapping the 401(k) Client Experience

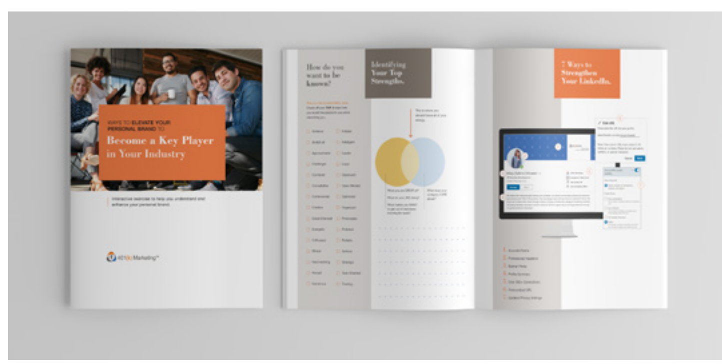
Experience Nearly 2 Out of 5 Plan Sponsors Are Actively Looking for a New Advisor. So how can advisors enhance their clients' experience and demonstrate expertise to scale and grow their practice? During this peer-to-peer conversation workshop, we will map new and ongoing client journeys to help attendees retain more clients and earn more qualified referrals.

60 – 90 MINUTES

Become a Key Player in Your Industry

Elevate Your Personal Brand. You will be asked to identify personality traits you would like to embody while simultaneously optimizing your online presence. The goal is to enhance your reputation to become a key player in the defined contribution industry. This interactive workshop is designed to formulate what you want to be known for and to elevate your personal brand, so you will always stand out in the crowd.

60 MINUTES



Custom Presentation

What do you have in mind?

We'd welcome the opportunity to create a custom presentation that is tailored fit for your audience.

Contact us to discuss your firm or conference needs.

PAST SPEAKING EVENTS

Advisor 2x | The Advisors Experience
ASPPA Annual TPA Development
Cambridge Retirement Conference
CEFEX Annual Meeting
Cetera Retirement Symposium
Fi360 Annual Conference
Hartford Funds
NAPA Summit
Nationwide CPFA Demonstrating Commitment
July Retirement Services
Kestra Retirement Executive Council
Lord Abbett Virtual Roundtable
LPL Financial Retirement Partners Symposium
OneAmerica Speaker Series
Retirement Innovation Lab
Retirement Think Tank
WIPN Events

REGULAR CONTRIBUTING AUTHOR

National Association of Plan Advisors
401(k) Specialist Magazine

FEATURED PUBLICATIONS

BenefitsPro
planadviser: Marketing Tips for 401(k) Plan Professionals
National Institute of Pension Administrators (NIPA)
401(k) Study Group Journal of Financial Planning
The Advisors' Newsletter

PODCASTS

401(k) Marketing Podcast
The Retirement Advisor Podcast
Marketing Strategies for Retirement Plan Advisors
What Retirement Plan Advisors Needs to Focus on in this New "Normal"
The 401JA(k)E Show
401(k) Marketing Magic
WhiteGlove Podcast
The New Environment of Effective Marketing
Outcomes with Ross Marino Podcast
The "upsides" to Pandemic Life
The Bridge Initiative, A Little Louder Now
The Marketing Magnet
Top Advisor Podcast
How to Create Lasting Brand Awareness

TV APPEARANCES

Retireholi(k)s
401(k) Specialist Magazine

INDUSTRY INVOLVEMENT AND NETWORKS

401(k) Specialist
National Association of Plan Advisors (NAPA)
Retirement Think Tank
We Inspire Promote Network (WIPN)

Our Mission

Empower retirement plan advisors with quality marketing that inspires Americans to become financially prepared for their future.

We believe the retirement plan industry can do better. Our clients are the best retirement plan advisors, TPAs and professionals in the business and care deeply about saving America's retirement future. We are proud to share their voice through industry writings, professionally designed brochures and marketing materials expertly crafted for the minds of plan sponsors and participants alike. This is done through thoughtful marketing strategy, brand creation and ongoing awareness campaigns.

— contact us today to learn how you can join our program and expand your 401(k) practice's industry awareness.

401(k) Marketing is based in **San Diego, California.**

Check us out at **www.401k-marketing.com**

401(k) Marketing®