



Wealth Management Systems Inc.

Ensure Your Rollover Success with Two New Products from WMSI

Wealth Management Systems Inc. (WMSI), the leading provider of rollover services in the retirement services industry, has launched two new applications that will transform the way you service rollovers today. These new applications put participant and plan data at your fingertips so you can market services to participants early in the game while fully engaging advisors in the rollover process.



New Participant Services

Rollover Central, WMSI's newest web based offering, quickly and easily introduces participants to your rollover services. The application can be structured to offer an entire marketplace of IRA options or customized to promote proprietary product offerings or direct advisor referrals. Designed with the user in mind, all screens and supporting educational content make it easy to complete a rollover online in just 20 minutes – with less paperwork and fewer hassles. Connectivity with various retirement plan providers and IRA providers makes it easier to open and fund IRAs through streamlined processing.

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New Advisor Services

WMSI's Advisor Rollover Network aggregates advisor, plan and participant data from multiple sources creating a centralized data base for advisory firms. Through the dashboard, advisors can access plan and participant data across their retirement plans in support of marketing and education campaigns. Advisors can also manage direct participant referrals to track and monitor all rollover activity. Used in conjunction with WMSI's Call Center Portal, the Advisor Rollover Network can be a very effective means of channeling referrals to advisors while having Call Center Representatives service other accounts directly creating a customized servicing strategy.

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Learn More Today

To learn more about how WMSI's new applications can enhance your rollover program visit us at www.wealthmsi.com or contact **Dave Marconi**, WMSI's Director of Business Development, at **617-934-2792** or via email at dmarconi@wealthmsi.com.