



Appleby Retirement Consulting Inc.
Unraveling the IRA Maze

253 Silvertop Drive, Grayson GA, 30017

☎: **Telephone:** 973-313-9877

📠: **e-Fax:** 888-524-3120

✉ Denise@applebyconsultinginc.com

www.applebyconsultinginc.com

Providing IRA Products & Services to Financial, Tax and Legal professionals

Appleby Retirement Consulting provides retirement plans related products and services to financial professionals and financial-service institutions with the goal of helping them to exceed customer expectations, and maintain a competitive edge. Appleby Retirement Consulting strives to ensure that all products and services provided are consistent with the customer's mission statement.

The following is a high level description of our products and services

IRA Quick Reference Guides

These contain condensed information on various retirement plans topics. Users can quickly obtain accurate and helpful information by utilizing these reference guides.

- Laminated color copies. This allows for frequent use, while preventing wear and tear. They are produced and distributed under the Appleby Consulting Inc name and logo
- PDF, with your firm's name and logo. These can be displayed on your website, or you can have them printed for internal distribution to your staff and financial advisors

IRA Client Newsletter (Includes an Advisor Guide)

You can use The IRA News & Tips Newsletter to:

- Remind your clients of upcoming dealings that apply to their IRAs,
- Make your clients aware of issues that could affect their retirement accounts,
- Encourage potential clients to contact you.

The IRA News & Tips Newsletter is published on a quarterly basis, and features seasonal and topical issues concerning IRAs and employer plans. The frequency of the newsletter is sufficient to keep you in the forefront of your customers' minds, without seeming to over communicate.

Priced affordably, our flexible options allow you to either purchase a single issue, or an annual subscription

The IRA Authority Newsletter: IRA Newsletter for Professionals

The IRA Authority is a quarterly newsletter for financial, tax and legal professionals who provide retirement products and services to their clients.

Available in PDF: No Hard Copy

On-Demand Tutorials

These are self-paced tutorials, which are housed at www.applebyconsultinginc.com. Individuals will be able to access the tutorials from the Internet for a period of 30-days, by using a specific user-ID and Password.

Individuals may be given the option to complete a test to gauge their level of understanding of the material. The course and test can be taken for an unlimited number of times, during the access period.

Tutorials can usually be completed within 20 minutes to one-hour, depending on the complexity

Teleconferences/Webinars

These are informational and/or training sessions provided VIA teleconferences or Webinars. These usually last for 45 minutes, with an additional 15 minutes for questions

Customized Workshops/Seminars

Provide customized training for seminars and workshops at your office or a location chosen by you

Technical Consultation

Provide response to technical and compliance issues relating to IRAs and retirement plans for small business owners

Please contact us to discuss any of our products and/or services

11.01.2010