

Referral Resources

manifest. | [Insert Logo Here]

On-Call Script

We've just partnered with a fantastic startup called Manifest. We've been big fans of what they are building and are excited to be able to work with them to improve retirement outcomes for all!

They are retirement transfer experts and have created a product that sits on top of your retirement plan. It helps you grow engagement within your program and has been proven to boost average account balances by over \$13K. All at no cost to you!

I'll send you an email with more details and a 1-pager. I'll also CC Jordan Evans (jordan@usemanifest) from the Manifest team, who'll be available to discuss further with you!

Email Referral

Prospecting email

Subj: Exciting new benefit just came across my desk

Hi [First Name],

I'd like to share an idea with you. Are you available to speak for 10 minutes this afternoon? My manager shared a new benefit with our team today.

Manifest is the easiest way to consolidate retirement accounts. It's a web-based app that is distributed through employers as a voluntary benefit. Today, only 1 out of 10 initiated transfers are ever completed, and trillions of dollars are lost to early cashouts or account abandonment.

Using Manifest, your employees can easily consolidate their accounts in under 10 minutes and ultimately increase their retirement savings by ~36%! Communicating with your participants can be difficult; Manifest takes on that work and can deliver customized employee communications, allowing you to focus on your other core initiatives.

Before you say you don't have the bandwidth to take on any new benefits in 2024, you should know that Manifest can be implemented in less than an hour and won't cost you anything! The receiving retirement provider pays a fee based on assets received!

Are you interested in discussing this further? I can invite a member of their team to join us.

Cheers,
[Rep Name]

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Post Call Follow Up

Hi [First Name]

Thanks again for your time today! We're excited to be working with you. As mentioned, Jordan from the Manifest team will schedule 30 minutes with you to share how Manifest is helping [Recordkeeper]'s clients further streamline their retirement benefits and, if appropriate, kick off the onboarding process.

I'll remain involved in that process to track progress and impact for you as well! Jordan will respond with his availability, and you can coordinate a time to speak.

All the best,
[Rep name]

Helpful Info

- Manifest is the easiest way to consolidate retirement accounts. It's a web-based app that is distributed through employers as a voluntary benefit.
- The average employee has 2.8 old retirement accounts from previous employers. Over 16 million orphaned retirement accounts.
- Typically, only 1 in 10 people who start a transfer finish. With Manifest, that process can be shortened from 8 hours of effort to 10 minutes.
- Manifest is free for employers and participants since the receiving 401(k) provider pays a fee based on the assets they receive.
- Twelve months after launching, Manifest grows account balances by \$13,450 on average, which can help reduce plan costs by up to 20%.
- Manifest has been proven to reduce admin burden by 3x

[User Quotes](#)

[Example User Journey](#)

[Manifest for Employers Landing Page](#)

[Security and Privacy at Manifest](#)

