



Value-Add Resources

Our business isn't all about the numbers. It's about investors. It's about financial professionals. It's about relationships, confidence and trust. It's about human beings with emotions, thoughts, and ideas that don't always fit neatly into spreadsheets or algorithms.

Our human-centric approach to investing considers how the markets impact your clients' mindsets, as well as how societal influences, generational factors, and their stages of life shape them as investors. And we provide financial professionals like you with proven, practical tools to help you grow and operate a more efficient practice as you strive to meet the changing needs of today's clients.

The following resources can help you deepen client relationships, grow your business, and separate yourself from the competition.

Investor Insight

Providing advice for your clients goes beyond knowing which investment strategies to recommend to meet their financial goals. It also requires being empathic, understanding their fears and their motives, and communicating effectively—which includes listening. Our investor insights include a combination of client- and financial professional-facing resources from the MIT AgeLab and other experts in various fields, designed to help you be better attuned to your clients' individual needs and values, and help them plan accordingly.

hartfordfunds.com/insight

Navigating Longevity

Retiring the Old Age Story—MIT AgeLab

Client and financial professional resources

In the traditional story of old age, a leisure-filled retirement is everyone's happily ever after. But some find that story to be boring. They're not ready to retire and relax—they want something more. Help your clients create their own version of the story and live a satisfying retirement.

hartfordfunds.com/age



8,000 Days—MIT AgeLab

Client and financial professional resources

Longer lifespans mean we could be facing 20 or more years of retirement, equaling approximately 8,000 days. Retirement is no longer an end, but rather a new, complex, and unknown phase of life. Help your clients anticipate the challenges and opportunities this phase might present.

hartfordfunds.com/days



MIT AgeLab

For more than a decade, we've partnered with the MIT AgeLab to uncover lifestyle trends, who investors trust, and the future of retirement—all of which influence investors' decision-making. Deepen your relationships with clients by applying MIT AgeLab research and tools to your practice.

hartfordfunds.com/agelab

Five Ways Technology Will Change the Way We Age—MIT AgeLab

Client and financial professional resources

Discover apps, sites, and devices that can make it easier for clients to work (if they want to), stay healthy, live in the home of their choice, and remain socially connected as they age. Share the new technologies that are transforming retirement.

hartfordfunds.com/tech



The Quality of Life—MIT AgeLab

Client and financial professional resources

Retirement can seem distant next to life's daily dilemmas, leaving little time to think about the future. Three simple questions from MIT AgeLab can help clients plan for a satisfying retirement:

1. Who will change my light bulbs?
2. How will I get an ice cream cone?
3. Who will I have lunch with?

hartfordfunds.com/quality



The Evolving Workspace—MIT AgeLab

Plan-sponsor resources for retirement-plan financial professionals

Longevity, demographic changes, and technological innovation are revolutionizing the world of work. These changes mean that employers may face a number of challenges, but more importantly, some exciting opportunities to gain a competitive edge. Help existing and prospective retirement-plan clients meet new employee expectations, and create a more productive—and potentially more profitable—workplace.

hartfordfunds.com/workspace

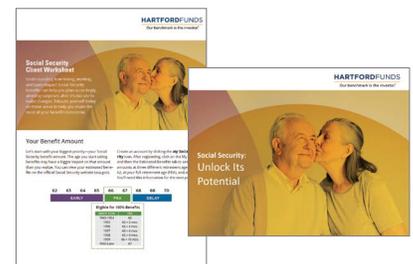


Social Security: Unlock Its Potential

Client resources

Knowing the factors that can negatively impact Social Security benefits can help clients avoid being caught by surprise. Educate your clients about three main areas—timing, work, and taxes—to help them make the most of their benefits.

hartfordfunds.com/ss



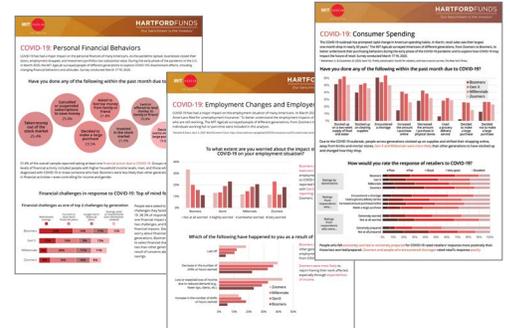
Investor Behavior

COVID-19 Research Series—MIT AgeLab

Financial professional resources

The COVID-19 pandemic has affected life profoundly throughout the US, but its effects are far from uniform. To better understand how Americans of different ages are reacting to its immediate and downstream effects, the MIT AgeLab surveyed people of different generations, from Zoomers to Boomers on a variety of topics.

hartfordfunds.com/covid



Fear, Finance & The High Anxiety Client—MIT AgeLab

Financial professional resources

When volatility strikes, a constant stream of “bad news” can increase investors’ fear and anxiety. At times like this your guidance is critical. Just as a good doctor knows how to treat the whole patient, rather than just a condition, financial professionals must be prepared to actively address how their clients feel as well as how they invest.

hartfordfunds.com/fear



Back from the Future

Client resources

Many investors hurt their long-term results with emotionally-charged decisions when crises or hot investment trends occur. They think changing their portfolio will help them avoid losing money or make a quick gain. Annie Duke, a decision strategist and former professional poker player, explains how clients can remain rational and not allow emotions to threaten long-term investment goals.

hartfordfunds.com/decisions



You Say “Tomato, I Say “Tomato”

Client resources

For many couples, the transition to the next phase of life is everything they’d hoped for. But for others, the next chapter can be a rude awakening. Why? Because all along, each person had a different idea of what this phase would be like—but they never expressed it. Help clients your clients determine which category they may be in, and what can they do about it.

hartfordfunds.com/couples



Maintaining Perspective in a Crisis

Client resources

The pandemic, economic turmoil, and an uncertain future have many investors on edge. They may be tempted to trade long-term results for short-term comfort. Providing a historical perspective on crises can help investors persevere when their confidence is tested.

hartfordfunds.com/crisis



Beyond Investment Illusions

Client resources

Worried or skeptical clients may make decisions intending to protect their investments that are actually detrimental to their portfolio. Help them see past common investment illusions to reach their long-term goals.

hartfordfunds.com/illusions



Media Replay

Client resources

Sensational media headlines can trigger panic and short-term investment decisions by your clients. Help clients maintain a long-term perspective and avoid knee-jerk reactions when the next “crisis of the day” makes headlines.

hartfordfunds.com/media



Accidental Sabotage

Financial professional resources

Approaches that seem like the “right” ones could be damaging relationships with women investors. Learn how many well-intentioned financial professionals unknowingly sabotage relationships with women investors—and what to do instead to build successful relationships.

hartfordfunds.com/connect



Practice Management

We partner with practice management experts to bring you proven, practical tools to help you operate and grow a more efficient practice. Our advisor consultants can help you apply these strategies through one-on-one guidance, group events, and financial professional workbooks.

hartfordfunds.com/practice

Prospecting

Never Stop Prospecting

Many financial professionals may stop prospecting during a crisis, fearing their motives could be perceived as insincere. But offering prospects your guidance, especially in trying times, is what makes top financial professionals shine. Learn three strategies to acquire clients without sounding salesy.

hartfordfunds.com/always



Mastering Affluent Client Acquisition

Research from The Oechsli Institute found that financial professionals who successfully acquire affluent clients regularly engage in specific key activities. Learn what these activities are and develop the skills necessary to master the “art form” of affluent sales.

hartfordfunds.com/affluent



The Affluent Digital Code

Many advisors don't know whether their online presence is helping or hurting their affluent prospecting efforts. How would they? They aren't digital analysts. That's where we can help. The Oechsli Institute's 2019 affluent consumer research uncovered digital strategies that can help you optimize the prospecting you do online.

hartfordfunds.com/code



Mastering LinkedIn

We collaborated with the renowned Oechsli Institute to help you leverage LinkedIn to grow your business. Get clear action steps for improving your LinkedIn brand, posting effective content, and prospecting.

hartfordfunds.com/linkedin



The Word of Mouth Influence Hierarchy™

Word of Mouth Influence (WOMI) can help you get referrals without asking for them. It involves getting your clients to tell others about your services. The Oechsli Institute uses a simple, yet powerful metric to measure WOMI with financial professionals: the number of referrals received in the past year. Find out the secrets of financial professionals who've used WOMI to bring in 10+ new clients a year.

hartfordfunds.com/influence



Efficiency

The Pillar System

Use the pillar system to simplify your strategy and magnify your results. A strategy to cut through the clutter and move you toward clarity, simplicity, and most importantly...results.

hartfordfunds.com/pillars



Overcoming the Bottleneck in Your Business

Traditional time management techniques aren't relevant in today's world. By replacing time management with focus management, you can grow a healthy business and decrease your busyness.

hartfordfunds.com/time



How to Win the Game Before It's Even Played

No matter how much you want to accomplish your biggest priorities, life's never ending distractions can quickly derail your plans. But if you have the right system in place, you can resist distractions and help ensure that you accomplish your top priorities for the day, allowing you to be fully present with the people and things that are important to you when your work is done.

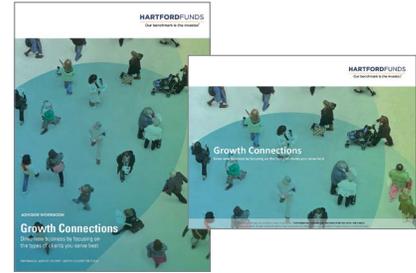
hartfordfunds.com/win



Growth Connections

Slow outflows and grow your business by creating a profile of clients you serve best, developing your distinct value proposition, and gathering prospects via legitimate referrals.

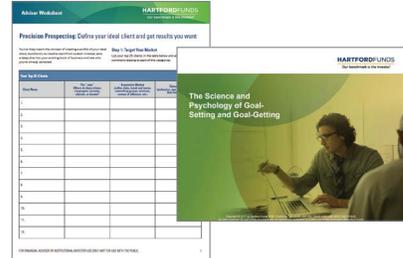
hartfordfunds.com/growth



The Science and Psychology of Goal-Setting and Goal-Getting

You'll learn how to use the mechanism in your brain that causes goal-setting to work, and learn steps for prospecting with precision to achieve the goals that are already within your reach.

hartfordfunds.com/prospect



Business Model

The Future of Advice—MIT AgeLab

The expectation to live longer and better is driving clients to demand more from financial professionals. They want you to prepare them for what they may confront in middle age and as older adults—meeting the challenges and embracing the opportunities. Your ability to provide these services will depend on how deep your relationship is with each client, how well you understand their evolving needs, and how knowledgeable you are about resources to help meet those needs.

hartfordfunds.com/longevity



Creating a Practice By Design, Rather Than By Default

The Pareto Principle, or "80/20 Rule" as it is frequently called, affirms that 80% of your sales are driven by 20% of your customers. You can use this rule to your advantage to retain your best clients, replicate those relationships, and develop your most viable prospects.

hartfordfunds.com/design



From Crisis to Team Continuity

Based on what you've learned during the pandemic, will your practice change? How much, and how will you figure that out? This worksheet provides six questions to evaluate how your team has functioned. You'll gain new insight about your people and processes, and learn tips for applying these insights to help you emerge with an improved, stronger team.

hartfordfunds.com/continuity



Why Many Teams Struggle

You're in charge of a team, but you wonder if its members are motivated, stressed out, or bored. Do they understand the mission? Is each team member the right fit? Learn how to plan effective meetings, determine whether you have the right people in the right roles, and whether it's time to add or replace a member. You'll also learn how to clearly communicate your mission and increase motivation.

hartfordfunds.com/teams



Serving Clients

Communicating to Connect

Many financial professionals struggle to connect with clients and prospects. That's because there are a variety of things that can get in the way of communication. During this entertaining, interactive workshop you'll learn four memorable ways to sharpen your communication skills, overcome the barriers, and better connect with clients and prospects.

hartfordfunds.com/communicate



The Dos and Don'ts of Effective Virtual Communication

In this new frontier, virtual meetings are becoming more commonplace. Whether you've been conducting virtual meetings or just getting started, these tips will help you conduct an effective virtual meeting while avoiding the most common mistakes.

hartfordfunds.com/virtual



Client Conversations

Stay top-of-mind with your clients and prospects by regularly sharing timely articles from our digital library, available at hartfordfunds.com/conversations



Investing for Retirement

Strategies to help you prepare for a secure retirement



Financial Planning

Simple ways to explain complex topics such as Social Security, Medicare, and capital gains



Managing Volatility

Help clients keep a long-term perspective—and see the opportunity—when volatility strikes



College Savings

Strategies for dealing with student debt, saving for college, and making the most of 529 plans



Investing for Growth

Articles include topics such as growing wealth through equities and outpacing inflation



10 Things You Should Know About Series

Each article lists 10 interesting facts on topics such as bear markets, stock market volatility, and credit scores

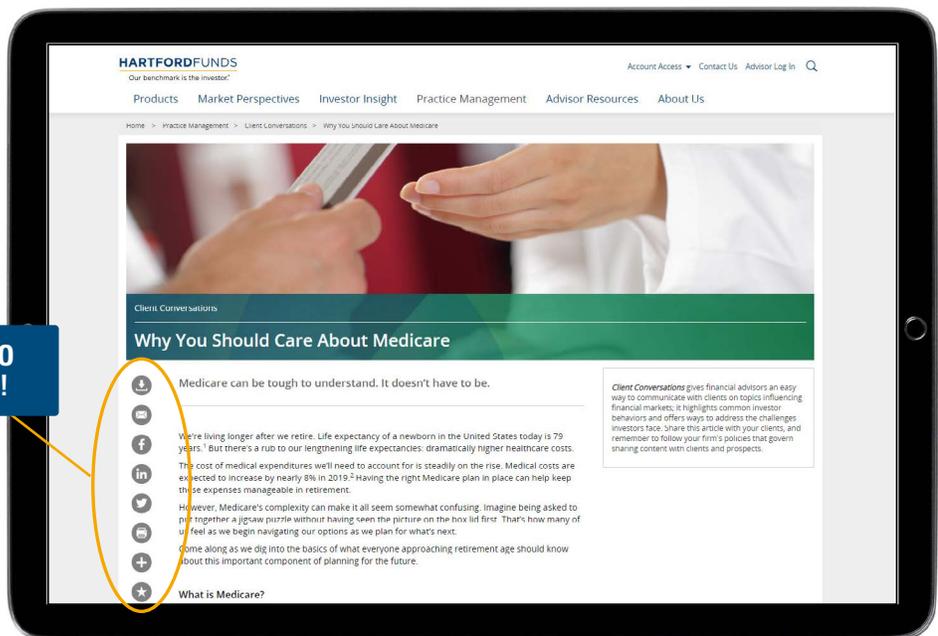


Investing for Income

Practical strategies for managing fixed-income risks and understanding the real return on CDs

By clicking a button, these articles can be shared however you choose. Remember to follow your firm's policies that govern sharing content with clients and prospects.

EASY TO SHARE!



Webinars and Podcasts

We offer timely financial professional on-demand webinars and podcasts to help you grow and strengthen your practice as well as your relationships. These resources feature a variety of guests, ranging from our own investment strategists and sales team to psychologists, physiologists, professors, and practice-management experts

hartfordfunds.com/webinars

hartfordfunds.com/podcasts

Continuing Education Events

Hartford Funds offers a variety of continuing education courses for financial professionals approved for CPE, CFP, CIMA, and SHRM credits. Many financial professionals use our courses to build strategic alliances with accountants to boost referral sources.

Next Step

If you're interested in any of our investor insights or practice management strategies, or if you're interested in hosting an event in person or virtually, please contact your Hartford Funds advisor consultant directly or call 800-456-7526.

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