

The DDW Reg BI Tool

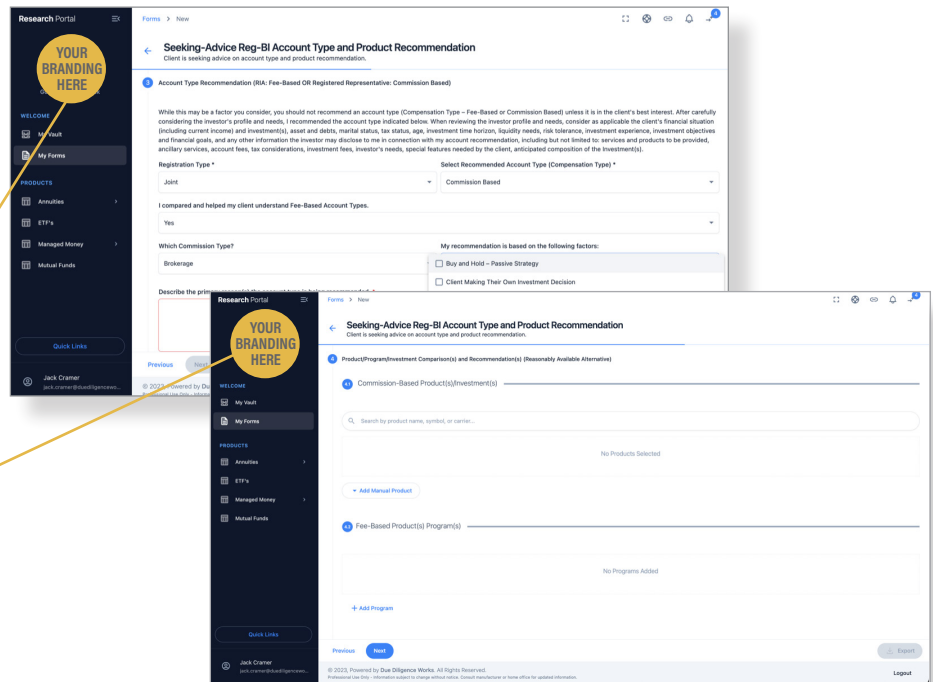
We know it's hard. That's why we work so hard to make it easier.*



Reg BI is too hard to make “easy” so we focus on “easier.” Some call our tool the “easiest.”

2 Steps in the Questionnaire

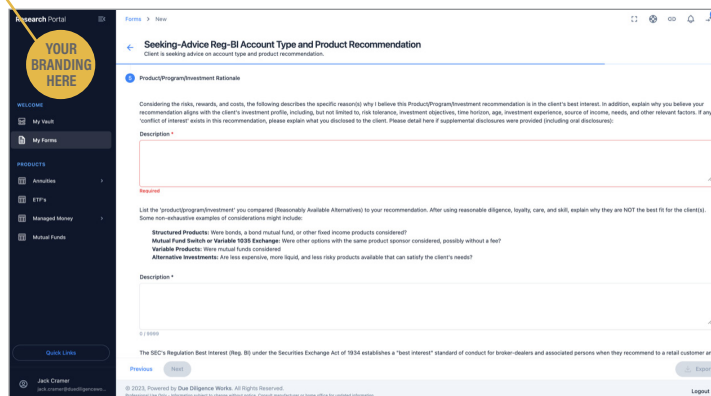
1. Choose the Best Account Type and Best Investment Products (don't forget Insurance, too)
2. Show Your Rationale and Documentation



YOUR BRANDING
HERE AND ALL PDFs
AND PRINTED DOCUMENTS

2 Wins for Your Firm

1. Free Branding
2. Bundle our 401k Rollover Tool into our Reg BI Tool for One Price and One Unified Experience



To learn more why Firms across the country are choosing DDW's Reg BI Tool, reach out to Mike or Jack.

Questions?

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