

Training programs for practice growth

The distribution team of Putnam Investments prides itself on helping financial representatives take a holistic, needs-based approach to working with investors. We offer a series of programs designed to help you grow your business in three of the most fertile areas for future development: investment, wealth, and practice management. Each training is designed for virtual or in-person presentation to help you hone your techniques and expand your base of knowledge.

Investment Management

Active insights *(Private briefings are available)*

The presentation covers the critical data impacting capital markets. It provides an overview of the global and U.S. economies and the key drivers of growth. The presentation reviews equity and fixed income markets along with commodities and volatility, examines risks, and provides a conclusion.

FundVisualizer®

Analyze funds from across the industry and evaluate more than 30,000 funds, ETFs, and indexes, using over 80 performance and risk metrics. Compare funds and portfolios directly from your desktop or tablet and create presentations.

Wealth Management

Tax strategies for the current landscape

From recent changes due to the Tax Cuts and Jobs Act (TCJA), the SECURE Act, and the CARES Act to the risk of higher taxes in the near future, taxpayers face challenges in managing their current tax bill while planning for an uncertain future. This training examines key income and estate tax planning strategies including maximizing the use of deductions, taking advantage of (current) lower tax brackets, and finding efficient means of transferring wealth.

Asset protection: Strategies for medical professionals and business owners

This course focuses on a variety of strategies that can be employed to help clients safeguard wealth. Specific topics discussed include understanding creditor protection differences between ERISA and non-ERISA retirement accounts and using advanced strategies such as trusts and LLCs.

Intergenerational wealth transfer

With over \$30 trillion in wealth poised to shift generations over the next few decades, firms and financial professionals are challenged with helping clients manage the transition of that wealth. This presentation explores barriers financial professionals face in making critical connections with the next generation of their clients. Actionable strategies around tax planning and efficient wealth transfer are discussed as potential tactics to help financial professionals make those valuable connections.

Connecting with business owners

From the historic tax law changes to new advancements in technology, business owners need more guidance than ever to address complex needs that impact the success of their business. Putnam offers a range of resources including interactive case studies, FA trainings, and educational white papers for you to leverage including:

- Business succession planning — Discuss valuation alternatives, deal structuring, and advanced wealth transfer strategies
- Small business tax strategies — Understanding and optimizing the new 20% deduction for qualified business income (QBI)
- Understanding tax reform — Examine key provisions of the Tax Cuts and Jobs Act (TCJA), SECURE Act, and CARES Act.
- Tactical tax planning — How to apply net operating loss (NOL) to a Roth IRA conversion, and how to understand net unrealized appreciation (NUA)
- Retirement planning strategies — Review options for small business owners
- Intergenerational wealth transfer

Wealth management case studies

A series of workshops focused on how to manage complex financial situations for your clients. These in-depth case studies include:

- “Helping business owners manage and transition wealth”
- “Efficient stock planning strategies for corporate executives”
- “Financial strategies for HNW individuals in retirement”

Practice Management

Client acquisition ideas for the virtual advisor

Learn how financial professionals are finding new approaches for client acquisition and asset gathering. In this presentation, we will go over timely wealth management ideas with actionable planning strategies, as well as practice management ideas to uncover new relationships — all in today’s virtual environment.

Social media training

Our trainers can help financial professionals with the biggest opportunities on LinkedIn including intergenerational wealth transfer, rollovers, targeted warm referrals, client engagement, and asset retention. We can also help you find your next best client through advanced search features.

- Get started with LinkedIn — Learn some astounding facts about social media and how to use it to build your personal and brand business. We also provide practical tips for making the most of online tools and apps, and to help you stay on top of trends in mobile technology and software.
- LinkedIn for recruiting — The Oechsli Institute’s 2014 Social Media Survey reported that 90% of financial professionals have a LinkedIn account. In this interactive session, we discuss how LinkedIn helps identify and source new talent, how to combine Boolean modifiers with advanced search techniques to get more results that are more accurate, and how Sales Navigator can help accelerate and automate the process.
- An advanced approach to business building using LinkedIn — Our trainers can help financial professionals with the biggest opportunities on LinkedIn including intergenerational wealth transfer, rollovers, targeted warm referrals, client engagement, and asset retention. We can also help you find your next best client through advanced search features.




How to create a world-class client experience

A world-class client experience is more necessary than ever before in an industry of constant change. In this presentation, we discuss why experience matters and what a world-class experience feels like. We define the three foundational values on which top financial professionals build a world-class client experience. And lastly, we outline how to create a world-class experience. Learn actionable strategies that financial professionals and their staff use to develop a repeatable process that yields remarkable moments and long-term clients.

Growing your value to women investors

One of the best opportunities for expanding your business may be in plain sight — prospecting to women. Women are major financial decision makers, and they control an increasing proportion of wealth and income in the United States.

Three key goals, one committed partner

 INVESTMENT MANAGEMENT	 WEALTH MANAGEMENT	 PRACTICE MANAGEMENT
<p>Portfolio Solutions Group Consider this diagnostic service to help identify unseen risks in client portfolios.</p> <p>Active Insights Get research-driven analysis of evolving market themes from our investment professionals.</p> <p>FundVisualizer Use this tool to analyze thousands of funds and indexes, make head-to-head comparisons, and generate client-approved PDFs.</p>	<p>Taxes Effective tax planning for business owners and individuals</p> <p>Business owners Strategies for taxes, succession planning, and asset protection</p> <p>Intergenerational wealth transfer Reach new clients as \$30 trillion in assets passes to a new generation.</p> <p>Regulatory updates Learn what the Tax Cuts and Jobs Act (TCJA), SECURE Act, and CARES Act mean for your clients.</p>	<p>Women and Investing Get insights on the distinct investment challenges for women, who control 51% of U.S. personal wealth.</p> <p>Social media Use our one-on-one LinkedIn training, social media playbook, and other tools to help build your online brand.</p> <p>Multi-generational practices Learn new approaches for connecting with the future generation of investors.</p>

For a full list of resources for each financial professional training, please visit putnam.com/advisor/continuing-education.

All funds involve risk and you can lose money by investing.
For informational purposes only. Not an investment recommendation.
Please note that some materials may not be available for use at all firms.

Your clients should carefully consider the investment objectives, risks, charges, and expenses of a fund before investing. For a prospectus or summary prospectus containing this and other information for any Putnam fund or product, call the Putnam Client Engagement Center at 1-800-354-4000. Your clients should read the prospectus carefully before investing.

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Putnam Retail Management

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