

LEVERAGING YOUR TECHNOLOGY RESOURCES

How technology can help you become more efficient and better connected to meet heightened client expectations.

Google Alerts: An efficient, effective way to stay up to date with your clients, prospects, firms and areas of interest

- Automatically receive emails when Google finds new results (videos, news articles, research, blogs, etc.) that match your search terms
- Customize alert frequency, result origin, how many results you want, and more

LinkedIn & Prospecting: Find the right connections, generate warm leads, and build trusted relationships

- Improve lead generation, sales prospecting, cold calling, and relationship building with member profiles and money-in-motion signals
- Use public information (e.g., your state's WARN report, planned layoff leads) to help investors who may be in transition
- Position yourself for an HR introduction by leveraging existing network connections with that company
- Save your searches to get proactive insights of target contacts and accounts

LinkedIn & Your Clients: Leverage your professional brand to strengthen trusted relationships

- Nurture existing relationships by sharing approved marketing content with your network
- Build a high-quality network of decision makers that can expand your access to key opportunities
- Search your connections' personal networks for a natural referral

LinkedIn & Company Pages: A company's profile to the world's professionals

- Connect with firms by following them to read their latest content, increase your intellectual equity, and drive economic opportunity
- Receive in your feed the latest "best of" lists, global thought leadership, interesting videos, and more
- Read community feedback and commentary to stay on top of trends and sentiments

Source rollovers/retirement plans

- Benefits Pro: public site with invaluable information on retirement plans
- Average assets and average enrollment
- Leverage current clients, find new ones, help plan sponsors

Brandywine Global
Clarion Partners
ClearBridge Investments
EnTrustPermal
Martin Currie
QS Investors
RARE Infrastructure
Royce & Associates
Western Asset

Legg Mason is a leading global investment company committed to helping clients reach their financial goals through long-term, actively managed investment strategies.

- Over \$728 billion* in assets invested worldwide in a broad mix of equities, fixed-income, alternatives and cash strategies
- A diverse family of specialized investment managers, each with its own independent approach to research and analysis
- Over a century of experience in identifying opportunities and delivering astute investment solutions to clients

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* As of March 31, 2017.

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