TRYGG FACILITATOR KIT

Protect Your Retirement Accounts

Everything needed to run a small-group roundtable on the login and the payment path for a 401(k), Roth, IRA, crypto wallet, or other investment account. Includes a facilitator plan, agenda, seven habits, a four-stage tabletop, and a one-page handout. This is not investment, tax, or legal advice.

Agenda

Time	Block	What happens
0:00 to 0:10	Welcome and hook	Read the four IC3 figures. Name the accounts in the room. Agree the hour is about the login and the payment path. This is not investment, tax, or legal advice.
0:10 to 0:25	Story round	One close call each: a text from the plan, a new login alert, a rollover pitch, or someone who asked for a seed phrase. No account numbers.
0:25 to 0:50	The seven habits	About three to four minutes each. A seed phrase is never typed into a website, a chat, or a support form. That line is not one of the seven habits.
0:50 to 1:10	Tabletop scenario	Groups of 3 or 4 work through The Monday rollover, one stage at a time, then report back.
1:10 to 1:20	Gap check	Yes or not yet on the seven habits, plus the seed phrase stored offline.
1:20 to 1:30	Commitments and close	Hand out the desk card. Each person names one habit they will start before the next payday and takes the card with them.

The Monday rollover

Give each group one stage at a time, about 5 minutes apart. Groups answer each stage's question before seeing the next.

MONDAY, 8 A.M.
A text says the 401(k) is locked and a link will open it.

Do you tap the link?

MONDAY, 9 A.M.
A messaging-app contact offers a better IRA and sends new bank instructions.

Which number do you call?

MONDAY, 11 A.M.
The real custodian site shows a bank and a beneficiary the person did not change.

Who is called first?

MONDAY, 2 P.M.
A helper offers to recover crypto that was already sent, for a fee paid in crypto.

Does anyone send more?

Debrief, after the groups report

- The account is opened from the firm's own app or from an address you already know. The link in the text is not that path.
- A new bank account is confirmed with the number on the statement. The number in the message is not that call.
- A bank or a beneficiary you did not change is a call to the firm, at the number on the statement, before anything else.
- No one sends more crypto to get the first crypto back. A seed phrase is never typed into a website, a chat, or a support form.

2 weeks before

- Confirm the date, the room, and who is coming
- Print the four IC3 figures and the link to the BetterInvesting article
- Send the invite with the ask to bring one close call, and no account numbers

Day of

- Print the desk card, one for each person, plus the scenario cards (one stage per card) and sticky notes
- Set up a flip chart with three columns: Login, Rollover, Payment
- Assign a note-taker

Within 1 week after

- Send a thank-you with the desk card and the top 3 gaps raised
- Give the host an action list: gap, suggested fix, owner
- Log who came and which accounts were named, without account numbers
- Schedule the quarterly refresher