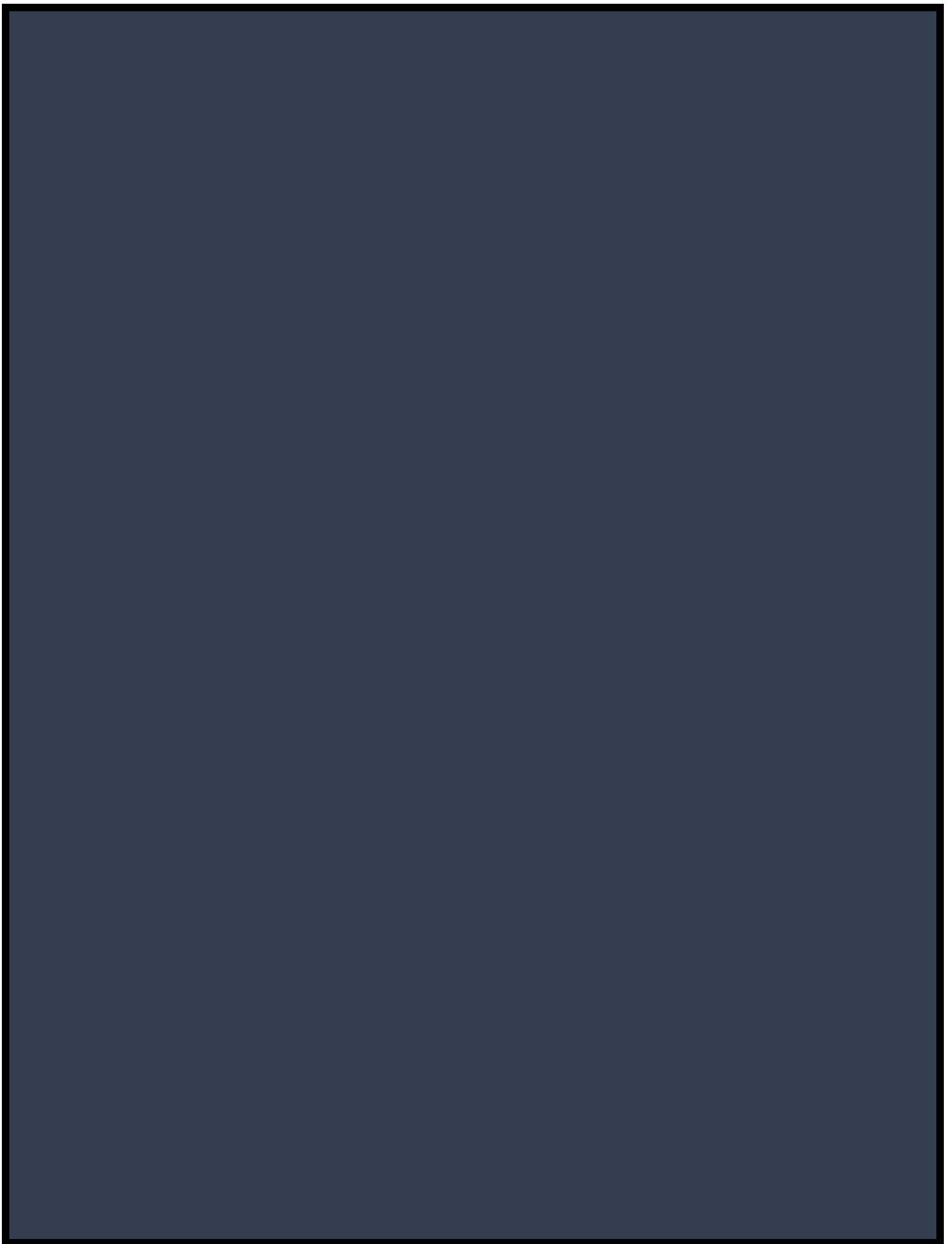


# Neighborhood Mailing Program





# Neighborhood Mailing Program

We all feel more comfortable doing something when we know others around us are doing the same thing. Consensus is the principle behind the Neighborhood Mailing Program.

The program is quite simple. Each time you bring on a new client, you will send a postcard to their neighbors (with their permission) announcing you have helped another person just like them. The postcard's call to action is for them to request their own "Personal Organization Kit".

Below is the step-by-step process to follow in order to implement this system. All of the documents and templates mentioned are included as a 5Q Member.

## 1) Print and Obtain a Signed Neighborhood Mailing Client Consent Form

This form has a picture of the front and back of the postcard so your new clients know what you will be mailing. Have them look it over and print their name and address as they would like it to appear on the postcard you will be mailing out. Lastly, have them sign the form giving you consent to mail the postcards to their neighbors.

## 2) Obtain a list of names that surround your new client's address.

A great resource to obtain the list is at: <https://www.techwalla.com/articles/how-to-find-your-neighbors-names-addresses-and-phone-numbers>

## 3) Prepare and Print the Neighborhood Mailing Postcard

This template is designed to print two postcards (2-sided) on an 8.5" x 11" sheet, which you will need to cut in half once printed. We suggest you use at least a 60# cardstock. You can either print these yourself or you can bring the file to your local printer to print them for you. Also note that because of its size, it will require a first-class postage stamp.

## 4) Mail the postcards

You should mail these out to as many of their neighbors as possible within a 5-10 mile radius (depending on location).

## 5) We suggest adding the following to your after hours voicemail message

"Thank you for calling [Company Name]. If you're calling to request your free Personal Organization Kit, please leave your name and your complete mailing address. We will send your kit within two business days" (You can then add any additional message that you normally have on your voicemail).

As the requests come in, mail the new prospects the Personal Organization Kit. and add them to all your prospect contact and Epidemic Marketing systems you have in place.

# Client Consent Form

## Neighborhood Mailing Client Consent Form



Does this name ring a bell?

[Client Name]  
[Client Address]

They're your neighbor! And they heard that [Advisor Name] does the things other advisors forget to do. They asked, "What things? We've got it all covered!" Ooops, contrary to their Advisor's, Attorney's and CPA's assurances, they found out that they were missing important documents. They also learned that they were not protected from identity theft and their professionals had missed dozens of additional very important details! In just one short visit, the problems got fixed.

As our way to introduce ourselves to you, as we did your neighbor, we would like to send you a FREE Personal Organization KIT to help you organize your life. Call now for your no obligation kit which includes your first checklist to make your life easier!

(XXX) XXX-XXXX

[Firm Name]  
[Address]  
[City, State Zip]

[Name]  
[Address]  
[City, State Zip]

Print below how you would like your name(s) to appear on the above postcard.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

I consent to this postcard being mailed to my surrounding neighbors with my name and address as stated above.

\_\_\_\_\_  
Client Signature(s) \_\_\_\_\_  
Date

# Prospect POK Intro Letter

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Company Name

---

Date

Dear [Prospect Name],

Thank you for requesting your Personal Organization Kit!

I know how important a comfortable and secure lifestyle is to those I'm surrounded by, and I've discovered a program to help achieve this goal. It includes ideas designed to help you enjoy the worry-free lifestyle you deserve. So, with that I'm sending you absolutely FREE: The Personal Organization Kit you requested.

As the enclosed brochure explains, on a monthly basis, I'll be sending you an additional FREE tip, tool or checklist to add to your Personal Organization Kit. I've enclosed the "Record Retention Guide" as your first piece.

These ongoing free resources are designed to help you:

- Locate important personal papers in seconds
- Get your "financial house" in order
- Legally pay lower taxes on your income
- Bypass probate without expensive, complicated trusts
- Identify the five steps you can take today to stop identity theft
- Ensure that you don't outlive your retirement savings
- Avoid making a common mistake in your Power of Attorney

When it comes to your financial well-being you need to be kept up-to-date and be on top of all the issues that might affect you.

Keep your eyes peeled for your next checklist in just a few more weeks, but in the meantime, feel free to call me if you have questions or need any assistance.

Sincerely,

[Advisor Name]

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STREET ADDRESS, CITY, ST ZIP CODE  
(123) 456-7890 | WWW.COMPANY.COM



# POK Brochure and Record Retention Guide

## What is a Personal Organization Kit?

Have you ever spent hours looking for...

- An automobile title?
- When and how much you last gave to a charity?
- What exactly was in your wallet or purse if it is lost or stolen?

Having a simple organization kit can mean the difference between hours of frustration or a simple task. Knowing where to find your records saves time and eliminates the stress and anxiety of searching during a crisis.

A system for organizing records will not only help you find important papers easily, but will keep you from accumulating old, useless papers that just add to the confusion.

You don't need fancy computers to keep organized (although you can apply these concepts digitally if you want). You can easily manage using paper and pencil copies with a fire-proof file cabinet, safe, or cardboard file boxes, whatever it is that you are comfortable with. The important thing is to develop a system to ensure that everything is in place.

### Why are we providing this to you?

We understand the importance that being organized plays in our everyday lives. Being organized provides peace of mind, saves time and can save you money as well. And if something should happen to you, it will help your loved ones manage your affairs confidently and easily until you are back on your feet again.

As a company that takes its fiduciary responsibility seriously, we constantly work to promote consumer awareness and educational issues for the people we serve. This FREE Personal Organization Kit is just one more way for us to do just that. Serve you.

### How does the Personal Organization Kit work?

This brochure is your introduction to the Kit. On the back, you will see some examples of the type of information you can expect to receive in the upcoming months. Each month you will receive an additional checklist. So, month by month, nice and easy, you can organize another piece of your life.

We will also include brief updates that will enhance your life. This information will take you less than five minutes to read and will improve your life (and sometimes make you chuckle). We hope you enjoy this free, helpful service as much as we enjoy bringing it to you.

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We recommend that you arrange your home file into the following categories. Many find it convenient to set up 2 file folders for each category - one for the current year and the other for

<b>Personal Information</b>	Do you have a way to organize items like your important phone numbers, professional advisors or simply a list of items you carry with you in your wallet or purse? With identity theft becoming more common, these checklists can help to ensure that you have the necessary information should the need arise. <i>Forms: Important Phone Numbers, Professional Advisors List, Lost or Stolen Wallet Inventory Checklist</i>
<b>Bank Account Information</b>	Are you scurrying to find your bank account information at the most inopportune times? These checklists will not only help you get it all in one spot, but also reminds you how long you need to keep these important documents. <i>Forms: Bank Account Information, Safe Deposit Box Inventory</i>
<b>Credit &amp; Loans</b>	Would it be helpful to know that you have all your credit cards and bank and mortgage loan information logged in one spot? You can also include your monthly credit card statements and receipts from your purchases. <i>Forms: Credit Cards &amp; Loans</i>
<b>Investments &amp; Retirement Planning</b>	Getting flooded with paperwork for all your investment accounts? Prepare a separate file folder for each individual account or contract. Include the company contact information for each. <i>Forms: Tax Preparation Checklist, Tax Deduction Checklist, Record Retention Guide</i>
<b>Taxes</b>	It's far easier to track things as you go than to scramble two weeks before tax time. These sensible forms give you a running total of deductions, estimated taxes and statement that you will need come tax time. <i>Forms: Tax Preparation Checklist, Tax Deduction Checklist, Record Retention Guide</i>
<b>Charities</b>	We all love to give to our favorite charities, and they know it. It is sometimes difficult to remember when and how much was last given. Never wonder again. This easy checklist help keep track for you. <i>Forms: Charity Donation Checklist</i>
<b>Home</b>	Do you have a hard time locating owner's manuals and maintenance records when you need them? Use this checklist to keep detailed records of home maintenance and repair. <i>Forms: Household Maintenance &amp; Improvement Record</i>
<b>Vehicles</b>	You never know where that important piece of information on your car or boat is when you need it. These simple lists keep purchase, maintenance, loan and lease agreements as long as you have your vehicle. <i>Forms: Vehicle Purchase or Lease Record, Vehicle Maintenance Checklist</i>
<b>Medicare</b>	We all want to take the best care of ourselves and more importantly help our loved ones help us if we ever need emergency care. Keep your medical history, prescriptions, doctor info, visit receipts, allergies, blood type and quality of life directive in one easy place. <i>Forms: Prescription Record</i>
<b>Insurance Policies &amp; Claims</b>	If a devastating storm blew through or you were in an accident, would you know where your insurance information is? These forms will help you organize your homeowner, life, health, automobile insurance contract and policy information. <i>Forms: Personal Insurance Policies, Home &amp; Personal Property Policies</i>
<b>Legal Documents</b>	It's not only important to have these documents but to know that they are up to date. Changes to the laws and personal situation occur all the time. Keep copies of items like your Power of Attorney, Trusts, and Medical Directives all in one place. <i>Forms: Power of Attorney, Trusts, and Medical Directives</i>
<b>Subscriptions</b>	Have you ever looked at your favorite magazine and discovered you are paid up for the next 5 years? Magazines learned long ago that every time they send and invoice, a lot of people pay it. This list keeps track of your magazines and renewal dates. <i>Forms: Magazine Subscription Checklist</i>
<b>Travel</b>	You are miles away from home when you are reminded that you have forgotten something. Perhaps the mail is piling up or your garbage can is sitting at the end of the curb. These forms will help you avoid those common "forgotten" items allowing your travel plans to go off without a hitch. <i>Forms: Travelers Planning Guide, Trip Itinerary, Packing Checklist</i>

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## Record Retention Guide

How long should you retain personal records? Some documents and records need to be kept permanently, but most can be discarded after a certain period of time. Here are some of the general rules-of-thumb as to how long you should keep documents. When in doubt, don't throw it out. If you have any questions, check with your financial advisor.

### Permanent Retention

- Deeds & Titles
- Property Records
- Education Records
- Employment Records
- Safe Deposit Box Inventory/List of assets
- Divorce Papers
- Mortgage Documents
- Pre-Nuptial Agreement
- Adoption Papers
- Birth Certificates
- Marriage Certificates
- Parents' Wills
- Vehicle, Boat & Trailer Title
- House Title
- Social Security Cards
- Social Security Earnings Records
- Social Security Audits
- Passports
- Stock & Bond Certificates
- Annuities
- Personal Financial Statement
- Bank & Trust Account Information
- Audit Report of Accounts
- Household Inventory: Receipts, Photos, Videos and other inventory records
- Retirement income information
  - Pension & Profit-Sharing Plans
  - Deferred Compensation
  - Rents and Royalties
  - IRA plans & 401(k) plans
  - Annuities (or unit sold)
  - Other Retirement documents
- Military Service/Discharge Records
- Civil Service Records
- Partnership or Corporate Documents
- Lawsuits or other legal actions
- Death Certificate
- Citizenship Paperwork
- Personal Health Records

### 7-Year Retention

- Home Deed and Closing Statement (7 years after you sell)
- Home Improvement Records & Receipts (7 years after you sell)
- Property Tax Assessments
- Federal, State and Local Income Tax Returns along with W2 forms and supporting documents
- Federal, State and Local Gift Tax and/or Estate Tax Returns with supporting documents
- Checks & Checkbook Records—7 years if tax deductible/2 years if not tax deductible
- Credit Card Statements—7 years if tax deductible/2 years if not tax deductible
- Credit Card Receipts—7 years if tax deductible/2 years if not tax deductible
- Paid Bills—7 years if tax deductible/2 years if not tax deductible

### Keep while you own or while in force

- Auto, Boat, other vehicles
- Ownership Papers
- Sales Contracts
- Receipts
- Maintenance Records
- License Information
- Lease Agreements
- Receipts and Appraisals for Personal Property, Artwork, Valuables
- Home and/or Apartment Lease Agreements
- Owners' Manuals for Appliances
- Receipts for Major Warranties/Purchases
- Warranties and Extended Service Agreements
- Insurance Papers:
  - Life Insurance
  - Health and Medical Insurance
  - Medicare Supplement Insurance
  - Long-Term Care Insurance
  - Disability Insurance
  - Mortgage Insurance
  - Homeowners or Renters Insurance
  - Auto and Boat Insurance
  - Travel Insurance
  - Accidental Death Insurance
  - Personal Umbrella/Liability Insurance
  - Credit and Credit Card Insurance

*If in doubt about a document, keep for a minimum of 3 years (maximum of 7 years)*

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