

LOW-COST MARKETING METHODS

Use a few methods, get a few people per month...use more and fill your office



1-Question Survey

Using just ONE of the USP's in these techniques really gets the client or prospects attention... gets them to realize what they are missing... and gets them to take action to find out more

Assisted Living

Proven system to get you into 55+ and Age in place facilities as a featured speaker at no cost

AT&T Union Retirement System

System that works with the USP to get you into unions... and companies

Be a Star

How create and leverage short videos on online platforms using the USP's to create interest, following and inquiries

Bumper Sticker or Magnet System

How using a simple bumper sticker or magnet with the USP on your car... the same as realtors and other small businesspeople do can give you a tax right off AND more importantly get people to call you

Client Advisory Board

This system builds "super referrers". When advisors use the system as it is laid out... they generate 60 or more referrals a year

Client Appreciation Events

It's all about the fun and building a great client relationship... but when you spend just 5 minutes at these events talking about one of the USP's... you'll pay for your event 5 times over

Community Education System

This easy-to-follow system will get you in front of 15 to 30 people... and they will pay you for the privilege... not a lot... but it is certainly better for them to pay you... than you are spending thousands to market to them!

CPA System

This system shows you the "How To's" of creating a referral stream from CPA's and accountants!

Digital Online Directory

When you use this system with a USP... you will move to the top of the page when people search for advisors in your area

E-book Bonus Gifts System

When you combine a USP with powerful value-added material and information... you'll be getting people calling you that are already ½ sold on moving their money to you

Events

These are small, medium, and large group workshops that leverage the USP's AND a technique proven to get more than 80% of the attendees into your office for your help

Financial Consumer Scorecard

This one-page marketing piece has been bringing in new clients like clockwork for over a decade... think of it like when you go to the optometrist... using this technique people clearly see what they are missing

Follow up Book System

System that utilizes a book that costs you just \$3.95... this book has been instrumental in closing some of the largest cases in our group because it details exactly what their current advisor is hiding from them... and highlight why you are the only real choice for clients that want a serious advisor

Friends-Helping-Friends System

When you use this system with a USP you are going to see at least one referral for every three clients your currently have... or new clients you bring on

Golden Referral System

Using your USP and this professional networking system will have attorneys and CPA's referring their best clients to you.

Guinness System

This system is based on the system the "World's Greatest Salesman" used to achieve that title. The Guinness Book of World Records awarded Girard the crown of most successful salesperson ever. We've taken his system and put it on steroids using our USP's

Halo Effect System

An easy, friendly... no risk way to get people around you to ask you to help them. It works especially well with groups that you belong to... places of worship... cycle club... fantasy football group... etc.

Handwritten Referral System

an extremely effective, cost-efficient way to use the world's best marketing piece... the handwritten note.

Holiday Lights Tour

A fun holiday event that can pay for itself many times over when you leverage a 5-minute USP presentation

Lifetime Protection Strategy

Leveraging one of our best USP's... "Are you using the program that will pay for 2 years of LTC without expensive, annual premiums."

Lifetime Income Distribution Method

Leveraging our BEST USP... "Are you using the technique that will increase your retirement income by 25%... instead of 4%... take 5%... AND reduce your chance of running out of money... and the best part is... you don't need to move a single investment to accomplish this!"

Neighborhood Mailing System

There is no system better at dominating a zip code than this system when combined with one of our USP's.

Pay Less Than 1% Tax on Investment Income

System utilizing one of our effective USP's

Pay Less Taxes on IRA Withdrawals

System that leverages a technique that can reduce many retirees' taxes by up to 70% on IRA and retirement account withdrawals

Property Casualty Referral system

There is nothing like getting other professionals to do your marketing for you. Here's a system to get a property casualty agent to set up meetings with you and their clients

Retirement stress test

An effective one-page marketing piece using our USP's

Royal Loyal System

When used with our USP's this system can bring in 3 to 15 high quality clients in 6 months... and it simply uses post cards to 100 people

Social Security system

Another effective system revolving around the USP... "Are you using the program that will replace your spouse's Social Security income when they die? Making sure your income doesn't plummet at their death?"

Toast of the town

Designed for those that like speaking to groups... but don't like paying for it. This system, when combined with our USP's, will get you in front of the movers and shakers in your town... and get those people referring to you.

Turn Your Current Book of Business into a Cash Generating Machine (No-cost options)

THIS system is THE system that has produced the most money for our advisors by far... and it doesn't cost a thing... sad thing is... every advisor can do this... virtually none do. You are missing the boat for so many reasons if you aren't utilizing this technique