


Digital Report/Package Campaigns

Another way to generate leads is by utilizing our digital report/package campaigns. You can choose which topics you would like to offer downloadable reports for via digital ads on Facebook. Last year, we had several advisors test these campaigns. We have also had several advisors test new reports or packages this year.

2020 Reports/Packages:


- **SECURE Act**
- **Retirement Survival Kit**
- **Income Risk Package**

2020 Report/Package Campaigns					
<u>Advisor</u>	<u>Topic</u>	<u>Date</u>	<u>RSVPs</u>	<u>Impressions</u>	<u>Imp./RSVP</u>
Eastham	CARES Act	7-Apr	25	11700	468
McLean	SS	10-Apr	32	24000	750
Scranton	Income Risk	14-May	8	4000	500
Scranton	Retiement Kit	14-May	3	2000	667



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Connecticut Retirees & Pre-retirees,
Decisions regarding Retirement can be complex and mistakes could cost you thousands over a lifetime.
Please take advantage of our complimentary, no-obligation "Retirement Survival Kit" to learn more about how you can help protect and grow your retirement savings. --> <https://www.yoursvp.org/LACCAQ>



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Retirement Survival Kit... 5 Free Tools to Help You Protect and Grow Your Retirement Savings



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Retirement Survival Kit... 5 Free Tools to Help You Protect and Grow Your Retirement Savings

We believe that retirees, and soon-to-be retirees, need to have access to the right information so they can make informed decisions when it comes to trying to protect their retirement savings from the ups and downs of the stock market. The materials included in our Digital Retirement Survival Kit will allow you to explore strategies that may help you establish ongoing streams of income that you can count on well into retirement—while reducing your exposure to stock market risk. When you sign up for this complimentary package, you will receive the following 5 tools:

1) Sound Income Strategies Video Animation:

Our animated videos simplify and demystify key financial topics that you need to understand to make informed decisions about planning and saving for retirement. These videos will provide you with a fundamental understanding of key topics, so you can be better prepared for retirement.

2) Financial Celebrity Video: "10 Things Financial Experts Want You to Know"

Some of the most prominent guests that have appeared on The Income Generation show with David J. Scranton share their words of wisdom for those within 10-15 years of retirement. Steve Forbes, Peter Morici, Robert Shiller, and other financial celebrities give you their best advice on what you can do to help protect and grow your savings in the current economic landscape.

3) Research Reports:

- **The Income Generation Report** This report explains what you can do to help protect your savings from stock market risk, while establishing streams of income you can count on well into retirement.
- **Facing Volatility** Find out what you can do today to help reduce, and even eliminate, your exposure to stock market risk before it's too late.
- **The Case for Fixed Income** This report explains how you can establish renewable streams of income, so you don't end up outliving your savings in retirement.

4) 15-Minute Call with a Local Income Specialist:

David J. Scranton can explain why focusing on income may make all the difference in reaching your retirement goals. With over 25 years of experience, David is ready to answer your retirement questions, and if you desire, can develop a custom-built retirement plan that's focused on providing ongoing income to meet your retirement needs.

5) David J. Scranton's Book *The Retirement Income Stor-E*

David's knowledge of stock market history enabled him to foresee the 2000 stock market collapse and helped many of his clients avoid damaging losses. His Amazon Best-Selling book is full of valuable information and destroys financial myths, while helping you build a well-diversified portfolio.

2019 Reports: (you can still use these)

1. **10 Estate Planning Mistakes to Avoid**
2. **RMDs: New Changes with the SECURE Act**

3. 7 Retirement Risks

4. Maximizing Your Social Security Benefits

2019 Report Download Campaigns					
<u>Advisor</u>	<u>Topic</u>	<u>Date</u>	<u>RSVPs</u>	<u>Impressions</u>	<u>Imp./RSVP</u>
Wood	EP	2019	22	11300	514
	RMD	2019	11	10300	936
	7 Risks	2019	5	4500	900
Cotter	EP	2019	8	9200	1150
	Aging	2019	8	8000	1000
	7 Risks	2019	7	2900	414
Burleigh	EP	2019	7	2300	329
	RMD	2019	7	3400	486
	LTC	2019	6	2000	333

There are 4 ads for each of the topics/reports above. These ads will be in rotation on Facebook for our target market over the course of a month. Each has a different landing page to gather the prospect's information so they can download the report.

Filters:

- **Age: 56-70**
- **IPA: \$250K+**
- **Homeowners**
- **Range: Within 25 minute drive time to office**

Follow-Up Procedures:

The "report" leads need to be nurtured. You can't expect to just immediately call "report" prospects and set an appointment in your office. From a posturing perspective, you would be so busy servicing your loyal clients that the prospects are lucky you are even willing to squeeze them into your schedule for a 15-minute call.

1. Call the prospect within 24 hours to make sure they were able to download the report, see if they have any questions, ask if they would like a hard copy mailed to them, and the major goal is to get a 15-minute call scheduled with the advisor. (See script below)
2. Follow our "3-Call Process" like we use for workshop prospects.

3. These prospects should be scheduled within 1.5 weeks or they will become too cold and be more likely to be a “no show” for the 15-minute scheduled call.
4. If the advisor runs late in a meeting and cannot make the scheduled call within 30 minutes of the set appointment, then you need to personally call them to apologize and let them know your appointment-setter will get them rescheduled.
5. It usually takes two calls with the advisor to qualify and disturb the prospects before pitching an appointment in the office.
6. If you are unable to reach them using the “3-Call Process” and sending them an email, at this point you can just add them to iContact and place them in the video animation drip campaign, etc.

Call Script:

*Good morning (**prospect**), this is (**staff name**) from (**office name**). I was calling to follow up with you about the (**specific report**) that you downloaded online. I just wanted to confirm that you were able to download it.*

If you would like a hard copy, I would be more than happy to send it to your home and also provide you additional reports and educational information.

*Whenever we send out educational reports to the public, it's customary for us to set you up with a 15-minute call with (**advisor name**), so that he/she may answer any questions you might have after reading the report. During this 15-minute call, you will be able to ask any questions you might have about your investments or retirement goals.*

*Although (**advisor name**)'s schedule is completely packed servicing his/her loyal clients, I can squeeze you in his schedule either Wednesday at 1 p.m. or Thursday at 5 p.m. Would either of those times be convenient for you?*

*Great! I just wrote it down in his/her schedule, and I will ask that you write down (**date/time**) on your calendar as well. I'm going to email you a confirmation of this scheduled call, as well as including some additional information that I think you will find very valuable.”*