

Master Social Security to Gain a Marketing Edge that Attracts and Wins New Business

PROBLEM: To capture more retirement business, you need a strong Social Security approach that not only maximizes boomers' income but convinces them you are the only advisor to manage the rest of their portfolio.



Implications:

- ✓ Boomers have messy Social Security issues due to divorce, death, blended families, etc.
- ✓ Wrong claiming decisions could cost them and their families serious money
- ✓ Even wealthy boomers will start the retirement conversation with questions about Social Security because it's something they know and read about in the news
- ✓ Boomers will use your Social Security expertise (or lack of it) to judge your ability to handle the rest of their assets
- ✓ Current clients will move their business to advisors who can offer personalized Social Security services

TRANSITION: Wow, I didn't realize Social Security was so important to boomers, although I do get a lot of Social Security questions at events and even from current clients. Am I really missing opportunities by not knowing Social Security? Is there really that much demand for Social Security expertise?

**KEY
1**

You need to understand how much retirement income boomers lose by not following a customized Social Security claiming strategy.

- ✓ How the wrong claiming age can cost retirees thousands over their lifetime
- ✓ Which decisions are permanent and can't be undone
- ✓ How the earnings test can sabotage boomers' income plans
- ✓ Why retirees often pay more in Social Security taxes than they need to
- ✓ Ways Medicare rules shrink Social Security benefits
- ✓ How bad decisions cost surviving spouses and dependents needed income

TRANSITION: It's good to know what the key mistakes are, but how do I turn this expertise into tangible benefits I can deliver to clients and prospects?

KEY 2

Boomers want a personalized Social Security game plan that maximizes income both for themselves and their families, and you need to know how to do it.

- ✓ Offer a Social Security planning meeting that explores their different options
- ✓ Give them a custom Social Security maximization analysis
- ✓ Show them a break-even analysis report
- ✓ Offer married couples a coordinated spousal planning report
- ✓ Run pre-retirees through the earnings test
- ✓ Show how the COLA affects lifetime benefits
- ✓ Prepare a personalized retirement income plan



TRANSITION: Wow, all those deliverables sound impressive, but I don't have time to prepare that kind of analysis from scratch. What tools do advisors use to be efficient?

KEY 3

Successful Social Security advisors use a wide range of tools, calculators, marketing materials, and resources to attract a steady flow of retirement planning prospects and maintain their competitive advantage. They need:

- ✓ Services that alert them to upcoming rule changes and their implications
- ✓ A library of up-to-date communications that cover all the common Social Security problems
- ✓ Calculators and software support that produce reports clients can understand
- ✓ Experts they can turn to for fresh insights and innovative new strategies
- ✓ A database of answers to help them solve complicated claiming questions
- ✓ Marketing materials that are always fresh, up-to-date, and valuable to prospects
- ✓ A way to educate CPAs, attorneys, and other strategic referral sources about Social Security

TRANSITION: I definitely could use that kind of support. I need a good one-stop turnkey solution that could help me master Social Security quickly and get me in front of pre-retirees right now!

SOLUTION: Become a member of Horseshmouth's Savvy Social Security Planning program to gain a technical and marketing edge that offers boomers personalized value and concrete deliverables.

You'll join a one-stop, turnkey, expert-supported program that will quickly transform you into a Social Security expert and give you a massive war chest of proven techniques, tools, calculators, marketing presentations, and more.

Capture more retirement business. Join Savvy Social Security today!

FOR INSTANT SERVICE

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