

29 Presentations to Consider Delivering in 2019

Presenter: Sean Bailey
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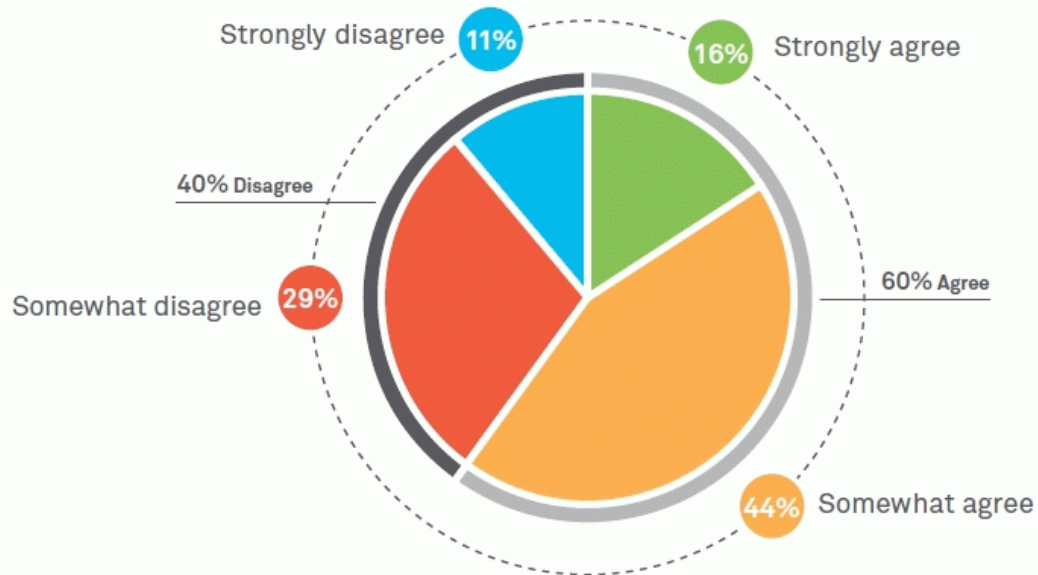
Advisors face many problems...

- Financial planning services can be hard to sell
- Robos prevent you from competing on investment management
- Your clients face complex, new problems
- A recession will cause your clients pain
- Financial planning is increasingly complex

All advisors sound the same

Investors Think All Advisors Sound Alike

MOST INVESTORS SURVEYED AS PART OF THE STUDY SAY THAT ALL ADVISORS SAY THE SAME THINGS, MAKING IT DIFFICULT TO DISTINGUISH BETWEEN THEM



Source: Pershing, Study of Advisor Value Propositions, 2014

All advisors sound the same



Source: Pershing, Study of Advisor Value Propositions, 2014

Problem: Many advisors suffer from a “value proposition gap.”

- Clients and prospects are often unaware of all of the financial topics you can help them with.
- In many cases, they seek out a new advisor because they believe this new advisor offers something that you don't.

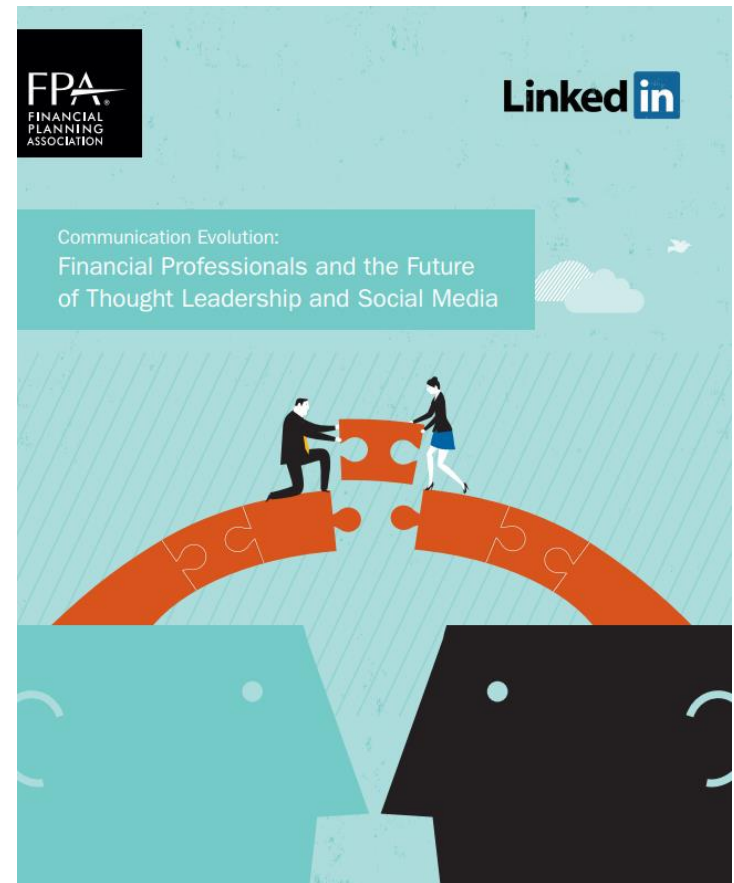
How do I let clients and prospects know that I can help them with various financial topics?

Key Idea 1: Many of the most successful advisors are positioning themselves as THE Financial Educator in their region.

Clients want education

“How important is it that your advisor provides you with education related to the market, investments or another financial topic?”

- FPA-LinkedIn Survey



Survey results

76%

of clients want advisors to deliver financial
education

Case Study: Victor Connor

- Victor Connor
- Florida
- 40 years in the business
- Reinvigorated his business with successful workshops



‘Why aren’t you doing seminars anymore?’

- Built business doing seminars but then stopped
- Why? They were too successful



Planning for the future



- Brought on junior partner
- Wanted to ramp up business
- Financial Educator workshop

Victor's process

- Various topics: Caregiving, Cybersecurity, IRA, Generational planning, Medicare, and Social Security
- Lunch and dinner on Wednesday and Saturday
- New topic every other week



Seminar logistics

- 2 different venues:
 - Community center on Wed.
 - Office on Sat.
- Provides sandwich patters and drinks
- 10-15 people per event



Marketing

- Newspaper ad every week
 - Financial educator
 - Lists topics and dates
 - \$300
- Facebook boosted post
 - \$30-\$40
- Email blasts to prospects, clients, connections



Follow up



- Invites attendees to a one-on-one meeting where he gets to know them
- At the end, asks for tax returns and statements to prepare recommendations
- Shares report at second meeting

Advice

- Focus on education; not selling
- Be consistent and visible
- Have handouts



**What topics should I be
presenting on?**

Key Idea 2: In order to close the value proposition gap, you need to present on topics that are keeping your clients and prospects up at night.

Social Security Planning



- **Audience:** Pre-retiree, retirees
- **Pain point:** Topic is confusing and the wrong decision can have lifelong consequences
- **Solution:** Your education and advice and help prospects have a better retirement.

Medicare Planning



- **Audience:** Pre-retirees
- **Pain point:** Most people do not understand the Medicare process and missed deadlines and mistakes can be costly.
- **Solution:** Your advice will help prospects avoid costly and irreversible mistakes.

Tax Planning



- **Audience:** Everyone
- **Pain point:** The Tax Cuts and Jobs Act has brought the most substantial changes to the tax code in 30 years and people are confused.
- **Solution:** Educate prospects on the new tax laws to lower their tax bill.

College Planning



- **Audience:** Baby Boomers and Gen X
- **Pain point:** College is one of the largest expenses a family faces.
- **Solution:** You can help prospects save on college by taking certain actions.

IRA/Retirement Planning



- **Audience:** Pre-retirees, retirees
- **Pain point:** Many baby boomers are nearing retirement and do not know what to do with their retirement accounts after work.
- **Solution:** You can create a retirement plan that works for their lifestyle.

Caregiving



- **Audience:** Baby Boomers
- **Pain point:** Most families do not have a caregiving plan in place when something catastrophic happens.
- **Solution:** You can educate prospects on the importance of a caregiving plan and help them create one that works for their family.

Estate/Generational Planning



- **Audience:** Pre-retirees, retirees
- **Pain point:** Everyone knows they need a will and an estate plan but few have something that is up-to-date and comprehensive.
- **Solution:** Help prospects control their legacy with estate and generational planning.

Cybersecurity



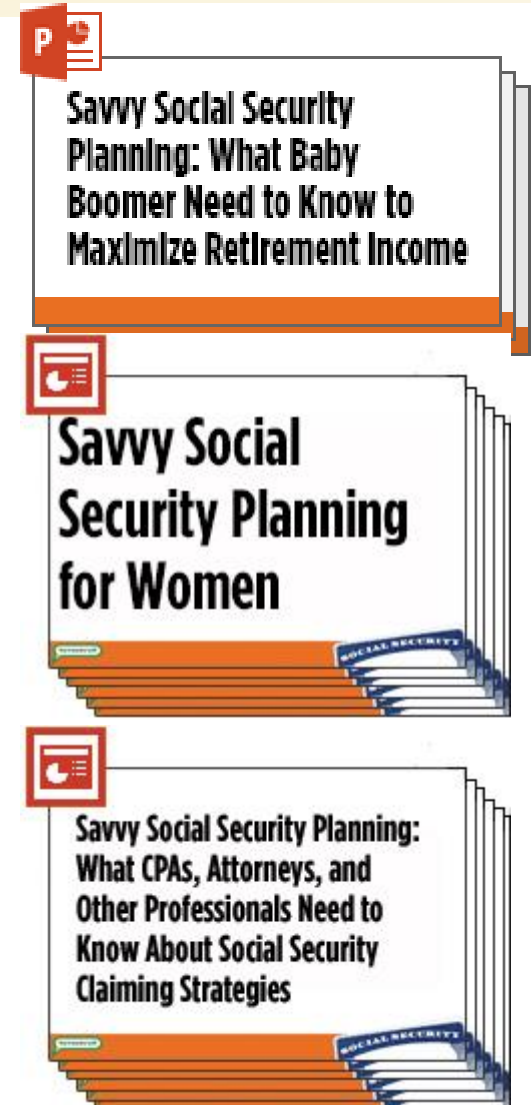
- **Audience:** Everyone
- **Pain point:** We are constantly bombarded with news of data breaches and hacks but have no one helping us improve our cybersecurity.
- **Solution:** You can be a cybersecurity guide and help clients and prospects create a cybersecurity action plan.

How can I possibly present on all of these topics easily?

Key Idea 3: Horseshmouth has FINRA-reviewed presentations and educational content on all of these financial topics. We provide you with slides, a script, and all the marketing materials you need.

Social Security Planning

1. Savvy Social Security Planning: What Baby Boomers Need to Know to Maximize Retirement Income
2. Savvy Social Security Planning for Women
3. Savvy Social Security Planning for Couples
4. What's New With Social Security? Seven Topics to Watch in 2019
5. Basic Rules and Claiming Strategies
6. Savvy Social Security Planning for CPAs



Medicare Planning

- 7. Managing Health Care Expenses in Retirement
- 8. 30 Minutes on Medicare Basics
- 9. Transitioning to Medicare
- 10. Managing Health Care Expenses in Retirement for CPAs

Managing Health Care Expenses in Retirement

What Baby Boomers Need to Know About Medicare and Long-Term Care

30 Minutes on Medicare Basics

What Baby Boomers Need to Know About Medicare

Transitioning to Medicare

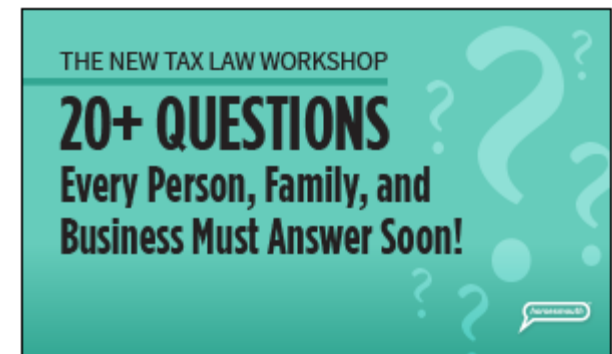
How health insurance works after you leave your job

[Advisor Name]
Firm
Disclosures

Tax Planning

11. The New Tax Law Workshop

12. How Tax Planning Changes
Through Four Stages of
Retirement



College Planning

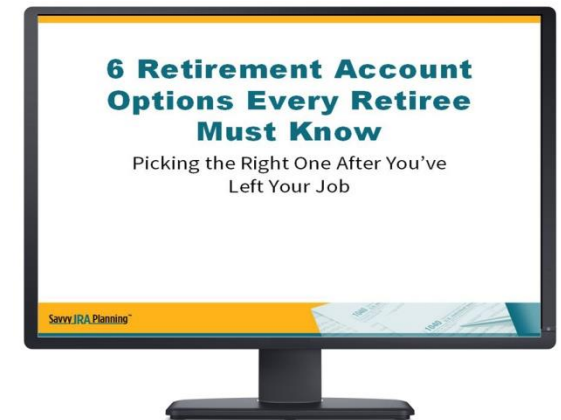
13. 6 Ways to Cut College Costs

14. An Inside Look at Qualifying for Financial Aid



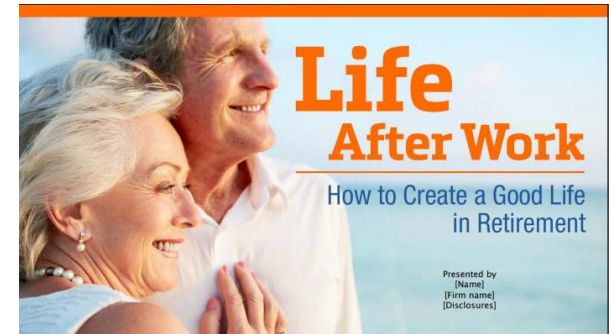
IRA Planning

- 15. Savvy IRA Planning for Boomers
- 16. 6 Retirement Account Options Every Retiree Must Know
- 17. An Overview of the Factors to Consider When Making Rollover Decisions
- 18. Savvy IRA Planning for CPAs



Retirement Planning

- 19. Life After Work: How to Create a Good Life in Retirement
- 20. How to Get Rollover Ready
- 21. COI Roundtable: Tapping into Retirement Accounts
- 22. COI Roundtable: Understanding the Net Investment Income Tax



Caregiving

23. 4 Keys to Making a Difference in a Family Caregiving Challenge

**4 Keys to Making a
Difference in a
Family Caregiving Challenge**

Savvy Caregiving 
FOR BOOMERS

Estate/Generational Planning

24. 6 Steps to Legacy Planning for the Generations

25. How to Plan, Communicate, and Execute the Smooth Transfer of Assets and Values From One Generation to the Next

**6 Steps to Legacy Planning
for the Generations:
Start Leaving Your Mark Today!**

Savvy Generational Planning 
FOR BOOMERS

**How to Plan, Communicate,
and Execute the Smooth Transfer
of Assets and Values From
One Generation to the Next**

Savvy Generational Planning 
FOR BOOMERS

Cybersecurity

- 26. 1 Hour to Savvy Cybersecurity:
10 Threats Every Person and
Business Faces- and How to
Fight Them Now
- 27. 30 Minutes to Savvy
Cybersecurity: 5 Threats Every
Person and Business Faces
- 28. Will Hackers Scam Your
Business?
- 29. Hack-Proof Your Smartphone



Ready-made presentations

- FINRA-reviewed slides
- Pre-written script
- Accompanying handouts



Slide #1 Savvy Social Security Planning: What Baby Boomers Need to Know to Maximize Retirement Income

Script
Welcome everyone, and thank you for coming. Today we are going to talk about Savvy Social Security Planning: what baby boomers need to know to maximize retirement income. When your parents retired, they probably didn't think too much about Social Security. They just went down to their local office as soon as they turned 65, or maybe 62 if they retired early, and applied for benefits. They took their benefits for granted and didn't ask very many questions. But baby boomers are approaching the Social Security question in a very different way.

- Slide #2**
Baby boomers want to know:
- Will Social Security be there for me?
 - How much can I expect to receive?
 - When should I apply for Social Security?
 - How can I maximize my benefits?
 - Will Social Security be enough to live on in retirement?

Script
Baby boomers want to know: Will Social Security be there for you? You've been told for years that the system is "going broke." But now that it's almost your turn to collect, is that really true?

You also want to know how much you can expect to receive. Before you can retire, you've got to know how you are going to support yourself. That means doing a budget, lining up all your income sources and knowing how much you can expect to receive from each. Social Security, because it is a relatively known quantity, represents the foundation of that plan.

You're also probably asking when you should apply for Social Security. You may have heard that if you apply early your benefit will be lower than if you apply later. But is it worth missing out on all those extra checks to have a higher benefit later on? We're going to shed some light on this important question today.

Something your parents probably never asked is how it is possible to maximize benefits. There is absolutely nothing wrong with using the Social Security rules to your advantage. Today we're going to talk about five ways you can maximize your Social Security benefits simply by knowing the rules and making smart decisions.



Customizable marketing materials

- Marketing toolkit
- Postcards
- Flyers
- Press releases



Follow-up materials

- Article reprints
- Pre-written emails and phone scripts
- Drip marketing campaigns
- First meeting guides



Is it easy and affordable to have access to all these programs?

Solution: Become a Horseshmouth Master Member.



MASTER MEMBERSHIP

The only program that enables advisors to learn, promote, teach, and advise clients on life's complex financial decisions...

What's included? Comprehensive access to all HM memberships valued at over \$6,900 per year

- Advisor/Client (\$997 value)
- Advisor/CPA (\$597 value)
- Horsemouth (\$247 value)
- Savvy Social Security Planning (\$597 value)
- Savvy Medicare Planning (\$597 value)
- Savvy IRA Planning (\$1,297 value)
- Savvy College Planning (\$597 value)
- Savvy Cybersecurity (\$597 value)
- Savvy Caregiving Planning (\$397 value)
- Savvy Generational Planning (\$597 value)
- What's Working Now (\$97 value)
- New Tax Law Briefing (\$397 value)
- Savvy Tax Planning (Coming in 2019!)



MASTER MEMBERSHIP

The only program that enables advisors to learn, promote, teach, and advise clients on life's complex financial decisions...

What else?

- All memberships—all the technical training, client education, communication and marketing support for one price, in one place, on one annual billing cycle, for you and your team...
- FREE shipping and handling on all Horsemouth products...
- A 25% discount off of all Horsemouth products—including Key Financial Data and extra Boomer Guides...
- A 25% discount off of all Horsemouth advisor training workshops, a \$500 savings!...
- All new client materials every year...
- Plus, get the lowest first-year rate by subtracting the credit for your existing membership(s).



MASTER MEMBERSHIP

The only program that enables advisors to learn, promote, teach, and advise clients on life's complex financial decisions...

What do our Master Members say about why they like the program?

- "I use the Master Membership to **get new clients**—through the presentations and supporting literature, which can all be edited and personalized to my preferences." —Jesse Travis, San Antonio, TX
- "I need to **expand my range** to be the "go-to" expert for all things financial when it comes to my clients." —Wendy Bennett, Butler, PA
- "Access to **professional marketing material** in all subjects related to retirement." —Joyce Khoury, Playa del Rey, CA
- "It's very convenient to have one place to go to get tons of information—much of it **compliance approved**." —Shawn Foster, Dallas, TX



MASTER MEMBERSHIP

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and advise clients on life's complex financial decisions...

You get everything for \$2,997—

a 57% discount

(Plus a credit for any programs you currently own.)

www.horsemouth.com/master

Or contact Cliff Moulton for a demo:

cliff@horsemouth.com



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