# 35+ Ideas for Growing Your Retirement Business With Client Education Webinars

Host educational webinars that showcase your retirement planning expertise and offer 'social proof' that you are the advisor with the answers.

**Your Host**:
Devin Kropp
Associate Editor

# The Difference a Retirement Plan Makes

Half of the affluent and HNW clients with a formal plan have consolidated 90%+ of their assets with their advisors — **more than double** the retirees who do not have a plan.

Source: *The Differences They Make: An Advisor, an Annuity, or a Formal Plan in a Retiree's Life*, LIMRA Secure Retirement Institute

# Today's Agenda

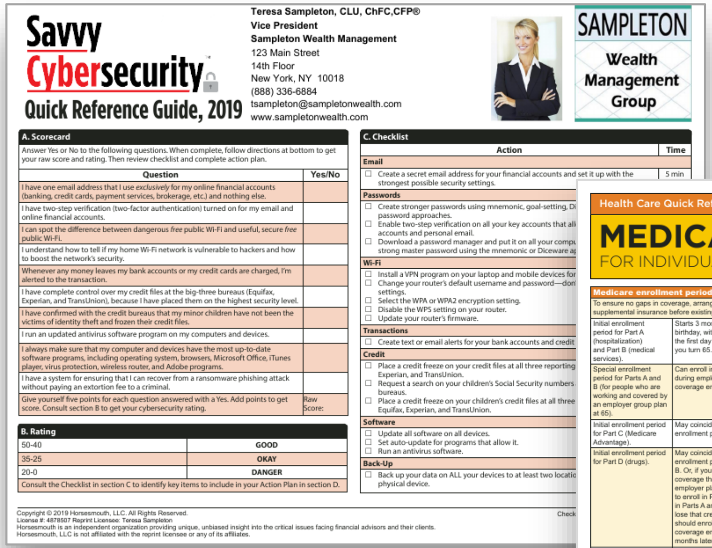
- The Difference a Plan Makes
- Why host education webinars?
- 35+ Ideas

# Advisor/Client Advantage

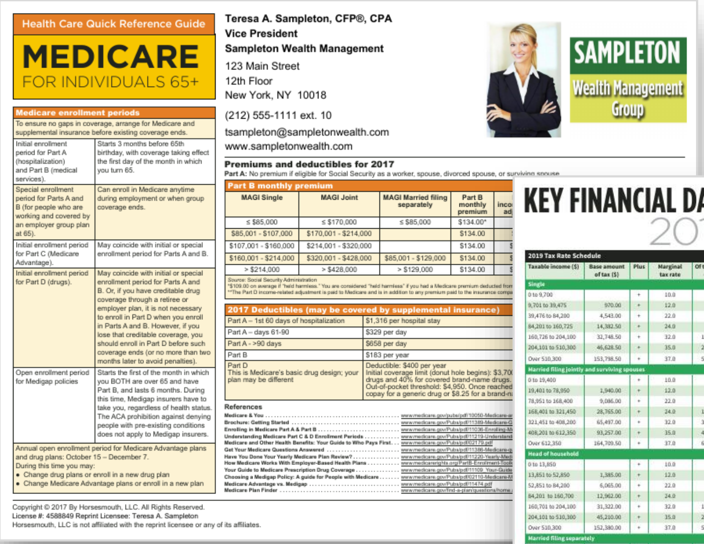
- Tactical Ideas
- Marketing Campaigns
- Action Plans
- Strategy Boot Camps


50+ Campaigns

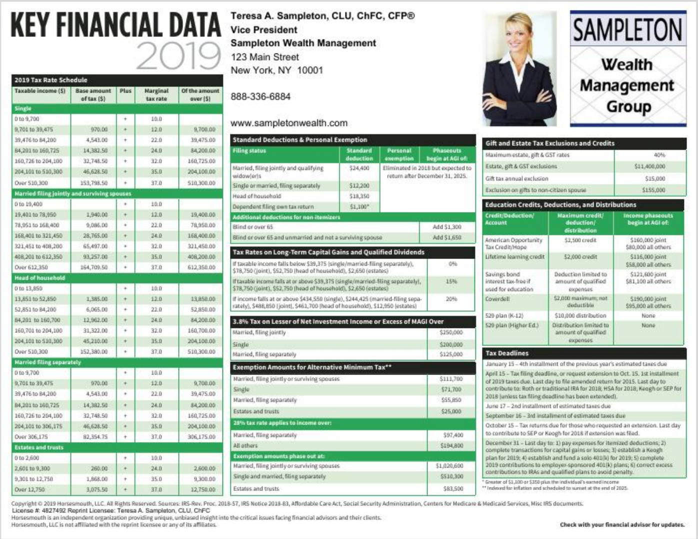
# Client-Facing Reference Cards




Cybersecurity Checklist 2019




Medicare 2019

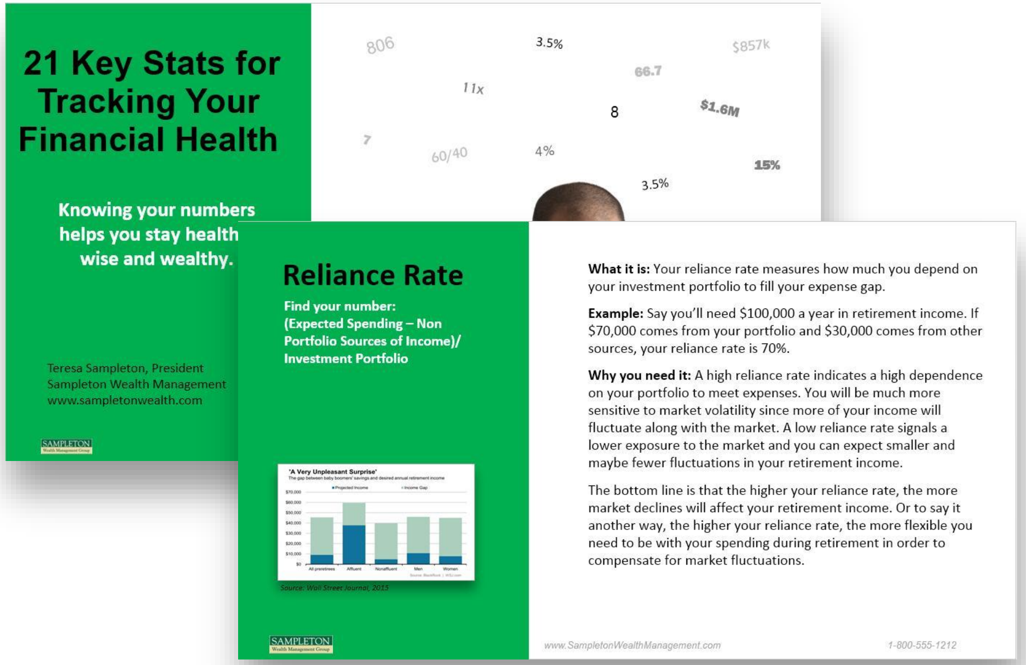



Key Financial Data 2019

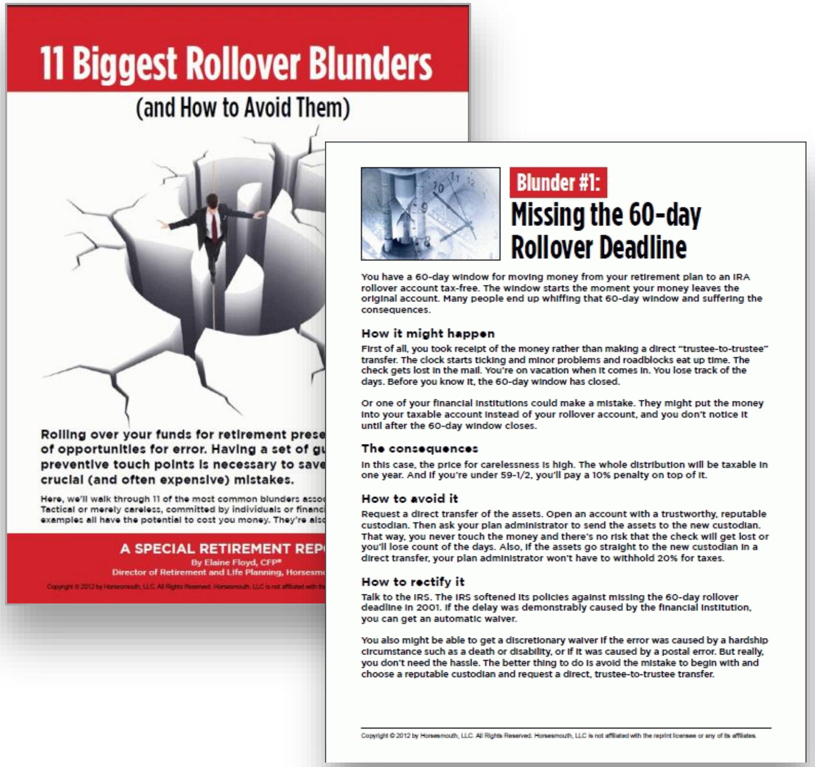
horsesmouth

ADVISOR/CLIENT

# Special Reports/Lead Magnets

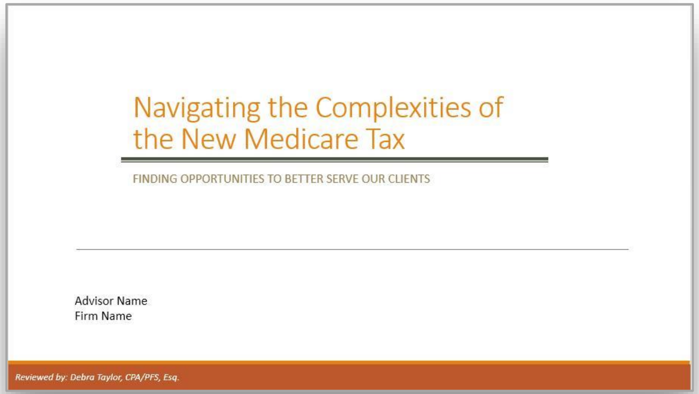



**Lead Magnet w/Landing Page, Display Ads, & Lead Nurturing Emails**

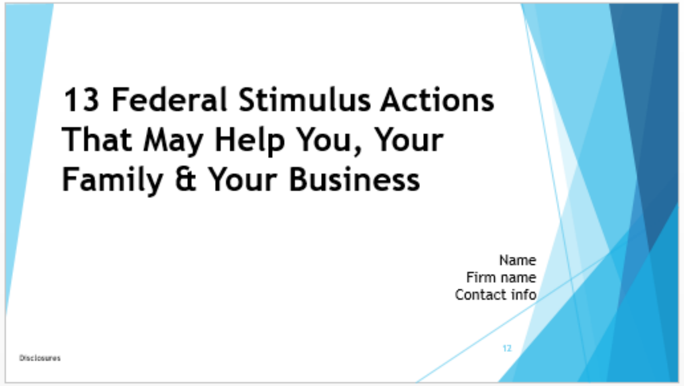


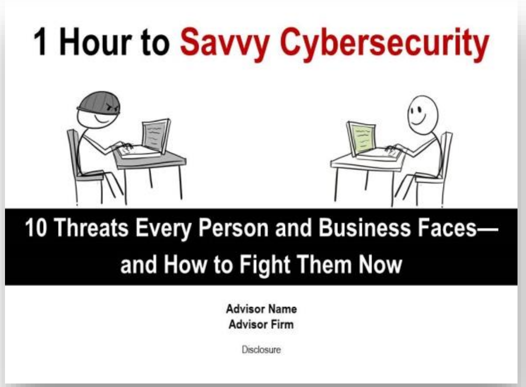

**Special Report or 11-Touch Email Blast**

# Client & COI Presentations





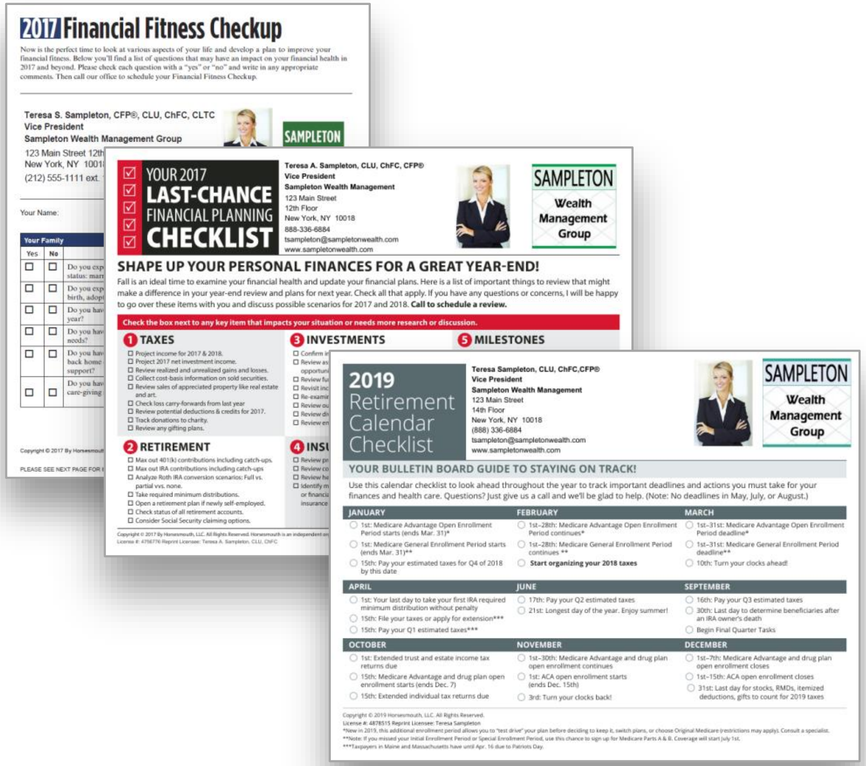





**Includes PowerPoint Slide Decks, Scripts & Toolkits**

# Communication Touches

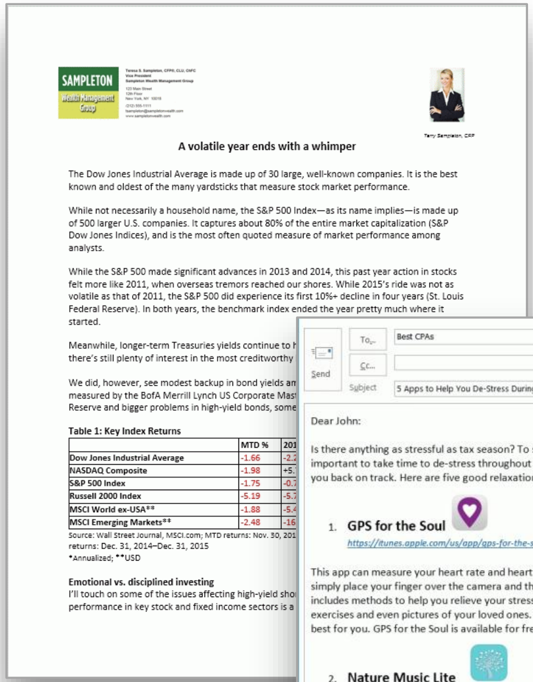

Postcards




Checklists


Articles

# Sales Letters


SAMPLETON Wealth Management Group

A volatile year ends with a whimper

The Dow Jones Industrial Average is made up of 30 large, well-known companies. It is the best known and oldest of the many yardsticks that measure stock market performance.

While not necessarily a household name, the S&P 500 Index—as its name implies—is made up of 500 larger U.S. companies. It captures about 80% of the entire market capitalization (S&P Dow Jones Indices), and is the most often quoted measure of market performance among analysts.

While the S&P 500 made significant advances in 2013 and 2014, this past year action in stocks felt more like 2011, when overseas tremors reached our shores. While 2015's ride was not as volatile as that of 2011, the S&P 500 did experience its first 10%+ decline in four years (St. Louis Federal Reserve). In both years, the benchmark index ended the year pretty much where it started.

Meanwhile, longer-term Treasuries yields continue to h there's still plenty of interest in the most creditworthy

We did, however, see modest backup in bond yields an measured by the BofA Merrill Lynch US Corporate Mas Reserve and bigger problems in high-yield bonds, some

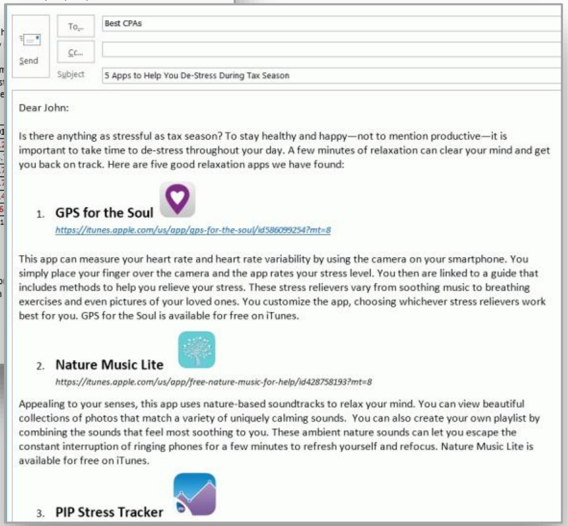
Table 1: Key Index Returns

| | MTD % | 201 |
|---|---|---|
| Dow Jones Industrial Average | -1.66 | -2.2 |
| NASDAQ Composite | -1.98 | +5. |
| S&P 500 Index | -1.75 | -0.7 |
| Russell 2000 Index | -5.19 | -5.7 |
| MSCI World ex-USA** | -1.88 | -5.4 |
| MSCI Emerging Markets** | -2.48 | -16 |

Source: Wall Street Journal, MSCI.com; MTD returns: Nov. 30, 201 returns: Dec. 31, 2014–Dec. 31, 2015
*Annualized; **USD

Emotional vs. disciplined investing
I'll touch on some of the issues affecting high-yield sho performance in key stock and fixed income sectors is a

**Monthly Market Updates**


To... Best CPAs
Cc...
Send
Subject 5 Apps to Help You De-Stress During Tax Season

Dear John:

Is there anything as stressful as tax season? To stay healthy and happy—not to mention productive—it is important to take time to de-stress throughout your day. A few minutes of relaxation can clear your mind and get you back on track. Here are five good relaxation apps we have found:

1. GPS for the Soul
https://itunes.apple.com/us/app/gps-for-the-soul/id586099254?mt=8

This app can measure your heart rate and heart rate variability by using the camera on your smartphone. You simply place your finger over the camera and the app rates your stress level. You then are linked to a guide that includes methods to help you relieve your stress. These stress relievers vary from soothing music to breathing exercises and even pictures of your loved ones. You customize the app, choosing whichever stress relievers work best for you. GPS for the Soul is available for free on iTunes.

2. Nature Music Lite
https://itunes.apple.com/us/app/free-nature-music-for-help/id428758193?mt=8

Appealing to your senses, this app uses nature-based soundtracks to relax your mind. You can view beautiful collections of photos that match a variety of uniquely calming sounds. You can also create your own playlist by combining the sounds that feel most soothing to you. These ambient nature sounds can let you escape the constant interruption of ringing phones for a few minutes to refresh yourself and refocus. Nature Music Lite is available for free on iTunes.

3. PIP Stress Tracker

**Seasonal Emails**


Wealth Management Group
9 Liberty Rock Rd., Suite 19
Peoria, IL 61601
(123) 456-7890
www.wealthmanagement.com

Dear Bob:

Tax season is over! And now that it's behind us, I wanted to make you aware of a "concierge" service I offer only at certain times of the year.

We know that friends and family are a vital part of your life, and when we see loved ones facing perplexing financial issues, we want to help.

Now that taxes are filed, I have some time anyone you care about who could use some help

Think of me as a help desk! While I can't p investment recommendations, I can offer resour from some of your favorite people:

- The newly married – How much mortgage is too m
- Mom – How much assisted living can we afford?
- Neighbor – What are some options in selling a bu
- New exec – What is restricted stock?
- College grad – How to manage college loans?
- Fishing buddy – Is it time to claim Social Security?
- Co-worker – Should I take the lump sum?
- Retiree – Is my spending on track with my income

It's not a service we advertise (and there a to make you aware of it. We offer this assistance never an obligation. This is just a resource I can

So, if any of your friends, family, or collea guidance or just would like to ask a question or t too big or too small.

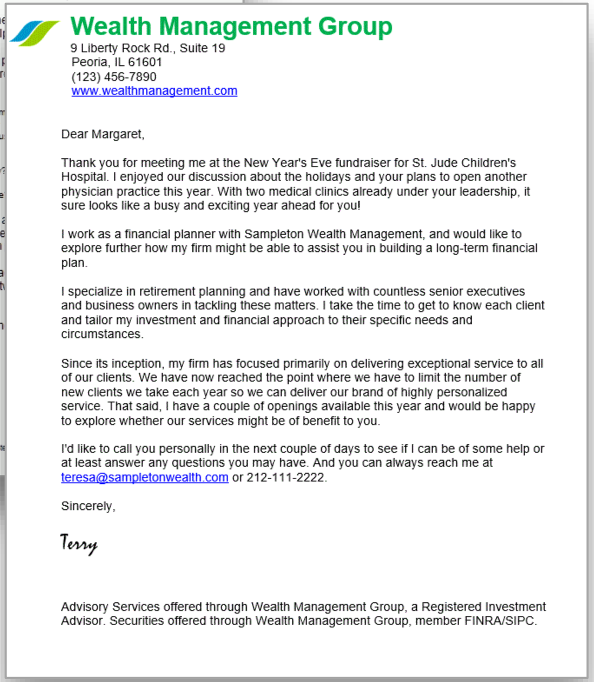
And, of course, I am always here for you if you n

Adam

Adam Sample
Certified Financial Planner
adam@wealthmanagement.com

Advisory Services offered through Wealth Management Group, a Registe Management Group, member FINRA/SIPC.

**Referral Letters**


Wealth Management Group
9 Liberty Rock Rd., Suite 19
Peoria, IL 61601
(123) 456-7890
www.wealthmanagement.com

Dear Margaret,

Thank you for meeting me at the New Year's Eve fundraiser for St. Jude Children's Hospital. I enjoyed our discussion about the holidays and your plans to open another physician practice this year. With two medical clinics already under your leadership, it sure looks like a busy and exciting year ahead for you!

I work as a financial planner with Sampleton Wealth Management, and would like to explore further how my firm might be able to assist you in building a long-term financial plan.

I specialize in retirement planning and have worked with countless senior executives and business owners in tackling these matters. I take the time to get to know each client and tailor my investment and financial approach to their specific needs and circumstances.

Since its inception, my firm has focused primarily on delivering exceptional service to all of our clients. We have now reached the point where we have to limit the number of new clients we take each year so we can deliver our brand of highly personalized service. That said, I have a couple of openings available this year and would be happy to explore whether our services might be of benefit to you.

I'd like to call you personally in the next couple of days to see if I can be of some help or at least answer any questions you may have. And you can always reach me at teresa@sampletonwealth.com or 212-111-2222.

Sincerely,

Terry

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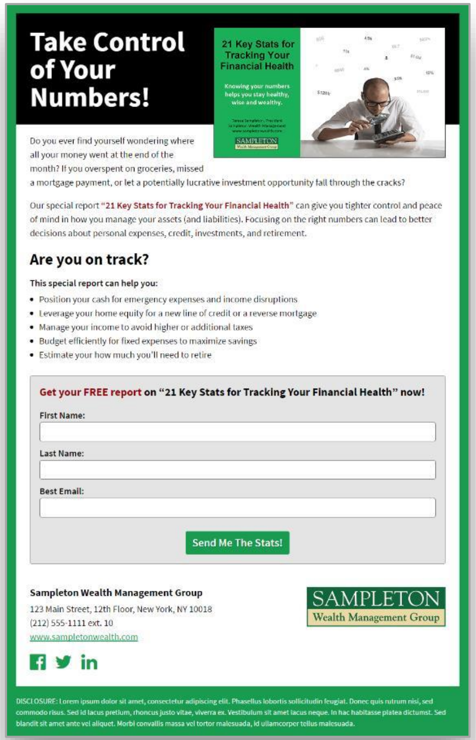
**Prospect Letters**

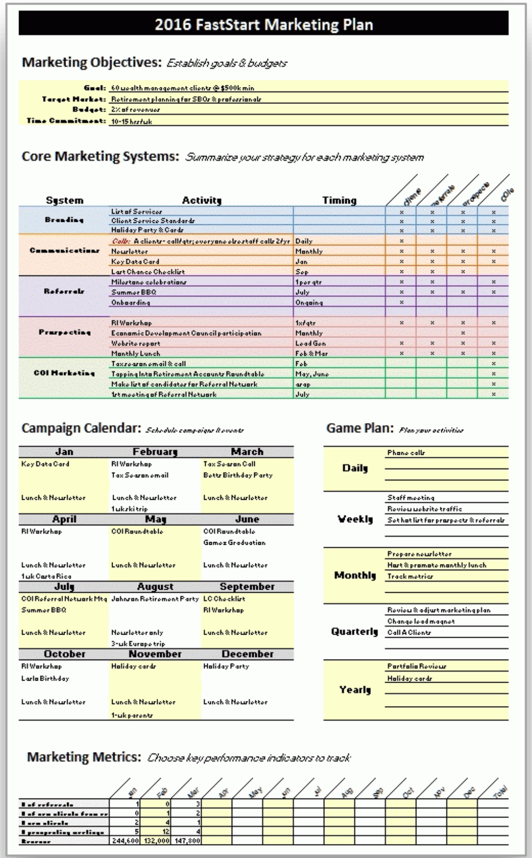
# Marketing Resources for You


List of Services Template



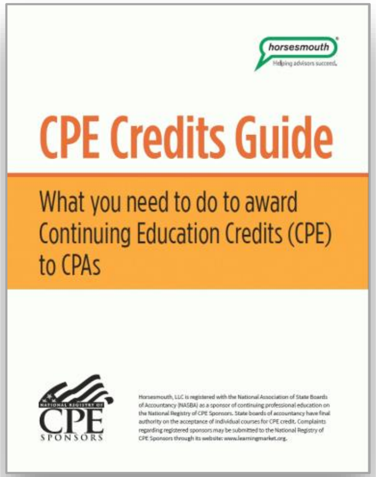

Support Materials

Monthly Webinars




Worksheets, Checklists, Marketing Plans, Schedules, Templates


Annual Marketing Calendar




Instruction & Guidance

# Why Host Educational Workshops?

- Hold 10-30 prospect meetings at once
- Become the go-to retirement expert in your market
- Easy for clients to invite friends & colleagues
- Prospects see that others approve & admire you
- Perfect for clients, prospects & COIs
- Build mailing list
- Set appointments

# 35+ Ideas for Holding Better Client Education Webinars

1

# Choose Your Webinar Platform

2

# Choose Webinar Length Wisely

3

# Think About Date and Time

**2020 JULY**

| SUN | MON | TUE | WED | THU | FRI | SAT |
|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

www.free-printable-calendar.com

4

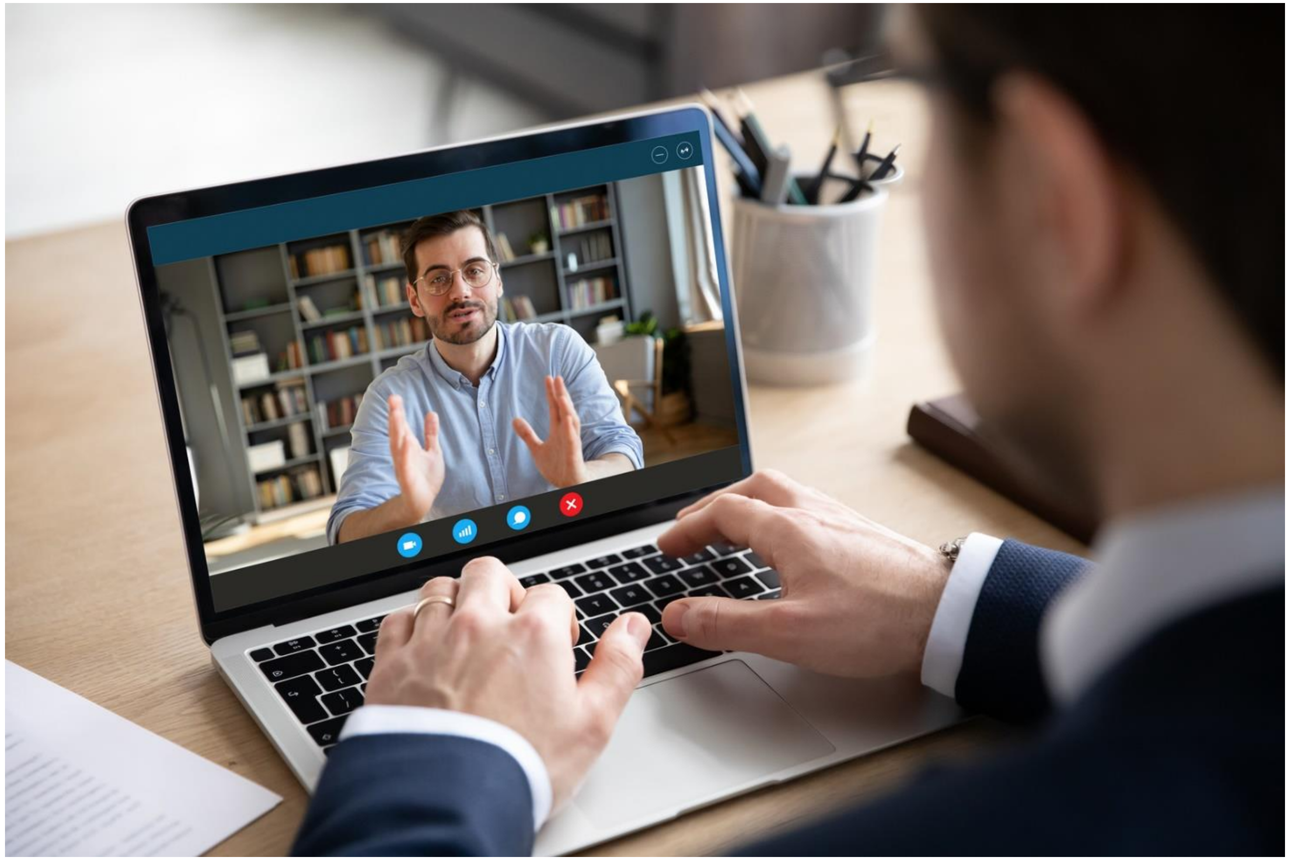
# Have Staff Online to Help

5

# Give Attendees a Handout

6

# Share Your Video



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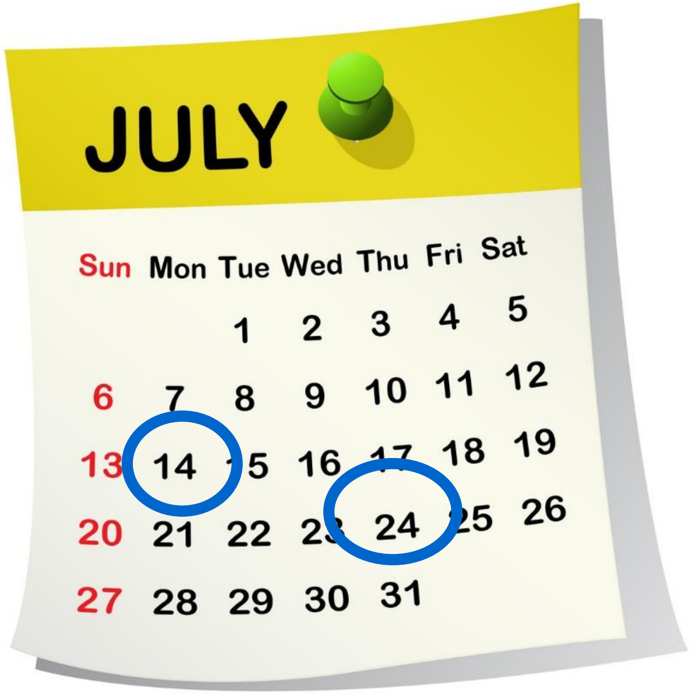
# Double Check Your Audio

# 8 Rehearse So Much You Can Talk It

9

# Shorter Lead Up Time



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# Send Confirmation & Reminder Emails

11

# Offer a Call or Meeting Before the Webinar

12

# Be the Star of Your Show

13

# Invite Other Professionals to Speak

14

# Work a Niche

15

# Tell Stories

# Add Horror Stories

# Focus on Retirement Income

THE NEWS

**53.4% of American Workers Have No 401(k) Plan!**

*(Source: Federal Reserve, Economic Well-Being of US Households, 2015)*

THE NEWS

**Only 33.7% of American Households Have IRAs!**

*(Source: Investment Company Institute, 2015)*

THE NEWS

**Only 9% of American Households Near Retirement (Age 55-64) Have $500,000 or More in Retirement Savings!**

*(Source: US Government Accountability Report, 2015)*

THE NEWS

**Only 14% of Americans Age 50+ Make 'Catch-Up' Contributions to Their IRA**

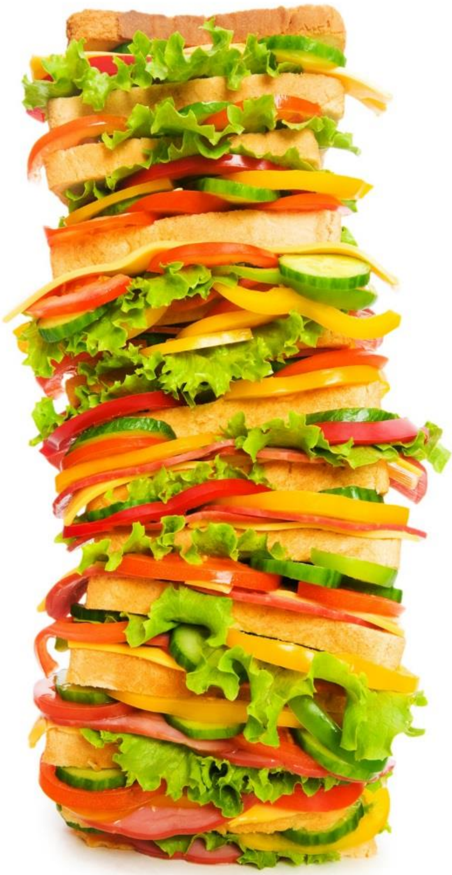
*(Source: Fundreference.com, 2015)*

THE NEWS

**17% of American Households Have Given No Thought to Retirement Planning; Only 13% Say They Have Given It a Lot of Thought**

*(Source: Federal Reserve, Economic Well-Being of US Households, 2015)*

# Pack In the Meat



# Give Your Webinar Unusual Titles

A Man Is Not a Plan! Retirement Workshop for Women

Dump the Chair for a Harley:
Retirement Planning for Dentists

How to Manage Your Serious Money
(i.e. the money you haven't told the kids about!)

# Get Visual

21

# Mention Multiple Services

## Retirement Services

| Retirement Planning | Retirement Income Planning | Social Security Planning | IRAs & RMDs | Pensions | Annuities | Tax Planning for Retirement |
|---|---|---|---|---|---|---|
| Goal Setting | Review of Income Sources | Social Security Analysis | IRA Contributions | Lump Sum Analysis | Risk Review | Roth Conversions |
| Needs Analysis | 401(k) Management | Disability | Roth IRAs | Find Lost Pensions | Income Replacement Analysis | Roth Recharacterizations |
| Retirement Plan Creation | Portfolio Review & Analysis | Spouse & Survivor Benefits | Rollovers | Cash-Balance Plans | Annuity Strategies | Tax Bracket Management |
| Estate Planning & Philanthropy | Inheritance Planning | Couple Coordination | Withdrawal Strategies | Single-Life vs. Joint-and-Survivor Analysis | Income Sustainability Projections | Asset Location |
| Debt Management | Cash Flow Projections | Special Needs Coordination | RMDs | Federal & State Pension Planing | Fees & Expense Management | Beneficiary Audit |
| Legacy Planning | Real Estate Investments | Filing Strategies | Self-Directed IRAs | Government Retirement Plan | Contract Reviews | Tax Loss Harvesting |
| Health Care Management | Reverse Mortgages | Medicare Planning | ROBS | Health Care Coverage | 1035 Exchanges | Credits & Deductions |

**Teresa Sampleton**
**President**
**Sampleton Wealth Management**
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**name@companyname.com**
**www.companyname.come**

SAMPLETON
Wealth Management Group

**Disclosures:**

Your company disclosure information. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed augue nisl, elementum sed mattis id, tristique ac enim. Cras scelerisque fringilla dolor, sed fermentum justo dictum nec. Cras id mauris eleifend, suscipit purus id, finibus metus. Maecenas dignissim at nisl quis suscipit. Aliquam sagittis odio eget urna malesuada, id hendrerit diam molestie.

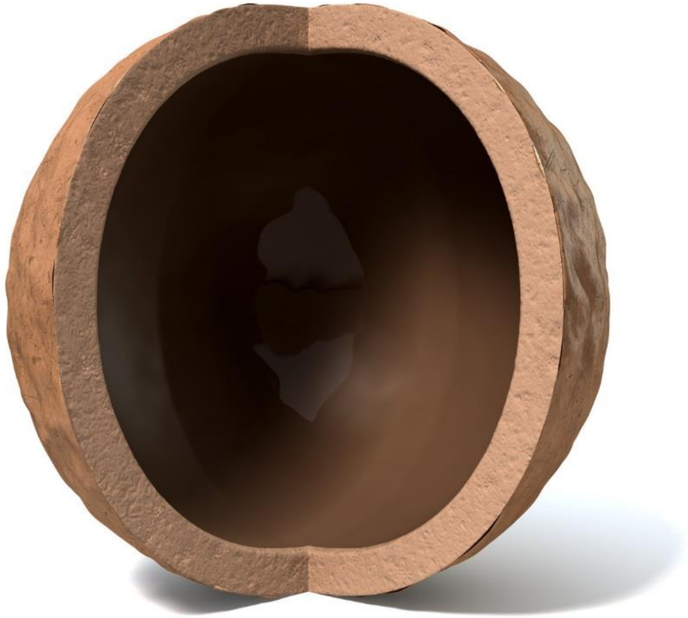
*Download List of Services Template from Advisor/Client*

22

# End With a High Earner Problem

23

# Summarize Your Talk in 15 Words



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# Offer Incentives for the Behavior You Want

# Offer a Toolkit

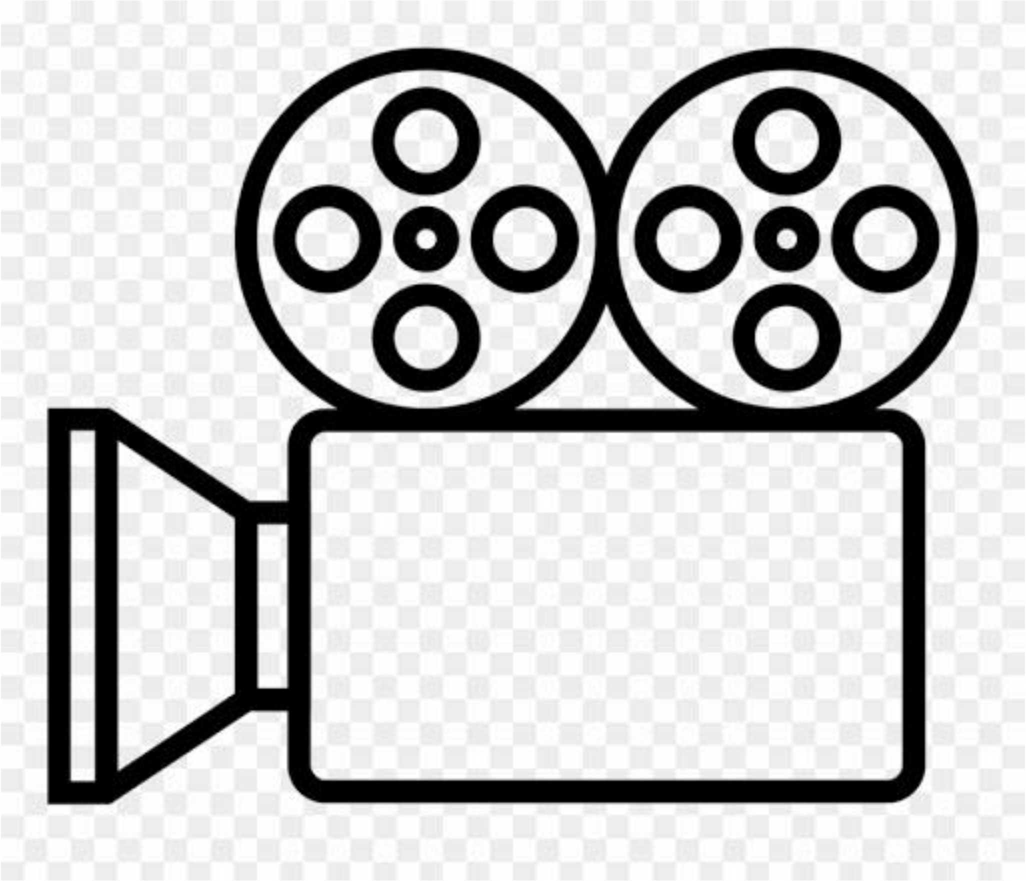


*Download from Advisor/Client*

# Decide On a Call-to-Action

# Hand Out & Collect Evaluation Forms

# Record the Webinar



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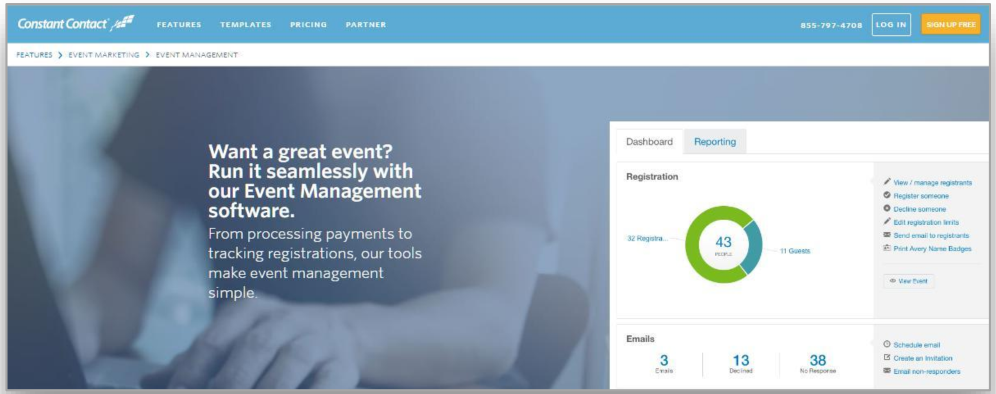
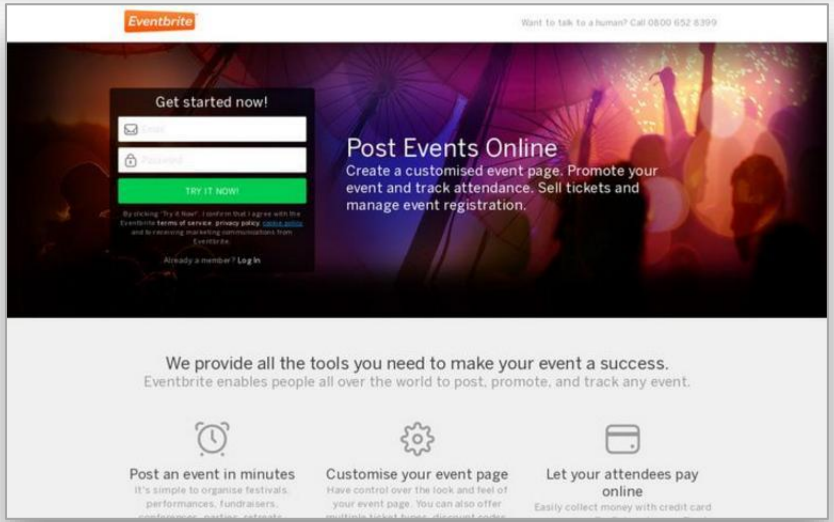
# Follow-Up Fast

30

# Automate Event Registration



# Partner With Local Employers

32

# Strategically Invite Guests & Referrals

33

# Promote Your Workshops Online


# Develop a Retirement Track

FINANCIAL
WORKSHOPS
IT'S YOUR MONEY • IT'S YOUR ESTATE


## FINANCIAL WORKSHOPS

### IT'S YOUR MONEY - FALL 2016

September 12 - Introduction & Quiz

September 19 - Annuities & Mutual Funds

September 26 - Financial Planning I

October 3 - Financial Planning II

October 10 - Long Term Care Planning

October 17 - Fixed income Investing

October 24 - Equity Investing

October 31 - The Big Take Away & Stock Market Contest

### IT'S YOUR ESTATE - SPRING 2017

April 3, 10, 17, 24

May 1, 8, 15, 22

**Details:**

- Doors open at 9:45 am; no reserved seating
- Sessions are free to the public and do not require advance reservations
- Suggested donation - $10
- Attendance at all sessions is not required
- Coffee provided

35

# Always Have a Webinar on the Schedule

# Advisor/Client Limited-Time Offer

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