

The 7-Step Digital Marketing Framework That Predictably Generates Targeted Annuity Leads And Appointments



What is AIM?

We are an FMO that works exclusively with qualifying independent financial advisors.

AIM is the first and only Marketing Organization that helps modern advisors grow their practice exclusively through our done-for-you digital marketing program and our proven virtual sales methodology.

Our team has experience in managing 8 figures in online advertising dollars over the last decade.

“Location independence and time freedom is the new measure of success for modern, ‘virtual’ advisors.”



Jovan Will
MANAGING PARTNER
DIRECT RESPONSE SPECIALIST



Fernando Godinez
MANAGING PARTNER
TRAFFIC GENERATION & TECHNOLOGY

FINANCIAL ADVISOR INTERNET MARKETING, FINANCIAL ADVISOR MARKETING, PODCAST

Virtual Sales Secrets: How To Build A Highly Profitable One-Man-Practice



By Jovan Will ⌚ January 19, 2018

AIM | FINANCIAL ADVISOR
INTERNET MARKETING

- Listen to it [on iTunes](#).
- Download as an MP3 by [right-clicking here](#) and choosing "save as".



Ep 27: Virtual Sales Secrets: How To Build A Highly Profitable One-Man-Practice

00:00:00

libsyn

We specialize in helping virtual advisors succeed in the following key areas:

1. Done-for-you digital marketing
2. Virtual client acquisition
3. Advanced case design and strategy



Virtual Sales Coaching & Training

We help advisors close business 100% virtually.

Our process completely bypasses traditional methods, thereby eliminating the need of having a fancy office, large staff, or in-person meetings.

We turned the uncharted area of how to close new business virtually into a precise science.

While others use guesswork, we use a predictable proven sales process that will help you close business virtually and serve more clients.



The best-in-business annuity contracting, case design and back-office support

We have access to the best annuity contracts from top-rated insurance companies and all of our advisors keep 100% of their commission on business closed from our leads.

Our world-class team will help you with advanced case design strategies and ensure that your deals get properly funded.



www.AdvisorInternetMarketing.com/Apply

AIM | ADVISOR
INTERNET
MARKETING

Annuity Leads-on- Autopilot Program



1. Traffic

Drive traffic by using a combination of paid traffic and remarketing ads along with organic SEO strategies, that specifically target prospects ranging from people approaching retirement to annuity buyers.



facebook

YouTube

yahoo!

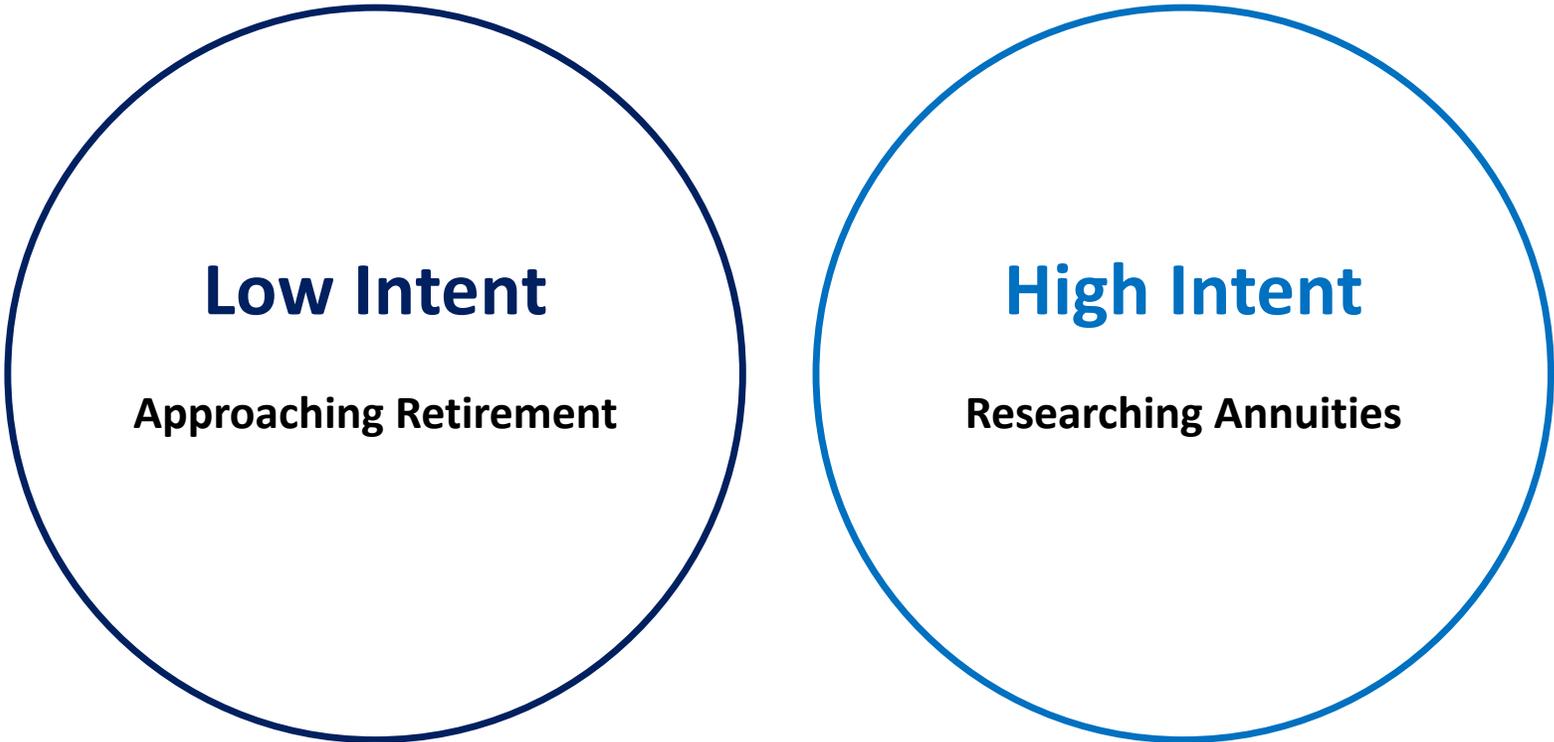
Google

Bing

Media Buys

Traffic Types

Different Levels of Intent



The diagram consists of two large circles side-by-side. The left circle is outlined in a dark blue color and contains the text 'Low Intent' and 'Approaching Retirement'. The right circle is outlined in a lighter blue color and contains the text 'High Intent' and 'Researching Annuities'.

Low Intent

Approaching Retirement

High Intent

Researching Annuities

Are you currently retired, or wanting to safely retire within the next decade?

In order to ensure a stress-free retirement, you need to ensure that you won't outlive your retirement savings.

Unfortunately, today that's easier said than done.... [See More](#)



Retirement Quiz Reveals Simple Formula To Increase Your Retirement Income And Safely...

[Learn More](#)

Stop worrying about your financial security and start living your perfect retirement lifestyle. Are you currently retired, or approaching retirement in the next 5, 10 or even 15 years?

Here's some sobering advice:

Our website provides 180,000 people per year free retirement tips and trusted advice.... [See More](#)



Free Quiz Reveals Uncommon Advice For People Facing Retirement

[Learn More](#)

Is An Annuity Right For You?

Find out in under 30 seconds



TAKE THE QUIZ ▶

Like Page

Could this be the the real "secret" to a worry-free retirement?

A couple of weeks back I was talking to an financial advisor, and he mentioned something that made me go, "Are you serious!"

I was in disbelief until I took this quiz and found out the incredible truth...



Is An Annuity Right For You?...Take The Quiz.

Quiz reveals how to get more income and safely grow and preserve your money throughout retirement...while avoiding the most common mistakes.

Learn More

20

562 Comments 311 Shares

Like

Comment

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GOOGLE allianz 222 review

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About 2,220,000 results (0.73 seconds)

In today's review, we'll be covering the Allianz 222 Fixed Index Annuity with Protected Income Value. The Allianz 222 is a fixed index annuity with available riders that provide lifetime income guarantees/death benefits / and a few other bells and whistles.

Allianz

Ad ·

Independent, Objective Review of the Allianz 222 Annuity

See The Pros & Cons Of 100+ Annuities & Find Answers To All Your Annuity Questions Here!

Independent, Objective Review of the Allianz 222 Annuity

In today's review, we'll be covering the Allianz 222 Fixed Index Annuity with Protected Income Value. The Allianz 222 is a fixed index annuity with available riders that provide lifetime income guarantees/death benefits / and a few other bells and whistles.

You've visited this page many times. Last visit: 7/24/17

Allianz Life | How Allianz 222 Annuity works

<https://www.allianzlife.com/annuities/fixed-index-.../222/how-the-product-works>

Allianz 222 Annuity provides the typical features of fixed index annuities – including principal protection, the potential for tax-deferred growth, options for lifetime retirement income, and a death benefit for your beneficiaries. ... a 20% bonus on any premium you put into your annuity in the first contract year, and.

Allianz Life | Allianz 222 Annuity

<https://www.allianzlife.com/annuities/fixed-index-annuities/222>

Allianz 222® Annuity can help. Like all fixed index annuities, Allianz 222 Annuity offers you principal protection, potential indexed interest based on allocation options chosen, and the potential for tax-deferred growth. ... two ways to get a bonus: Allianz 222 credits the Protected ...

An impartial review of the Allianz 222 Annuity -

May 19, 2014 - The S&P 500 without dividends was up 13.4%. In the Allianz 222 Annuity, if you selected monthly sum crediting, you would be credited with a gain of 2.26%. If you selected the annual point-to-point crediting option, you would receive 2.25. It is important that note that Allianz can change your caps at any time.

Top 114 Reviews and Complaints about Allianz Life Annuities

<https://www.consumeraffairs.com> › Financial Services

★ ★ ★ ★ Rating: 1.7 - 73 votes

We went to a couple of seminars in NH and fell for the smooth-talking rep about the Allianz 222 fixed index annuity. He told us there is a 20% cash bonus. After speaking with Allianz directly, and as noted on their website, there is no cash bonus. The 20% goes towards the protected payment base. You definitely have to take ...

Allianz 222 Fixed Index Annuity Review - YouTube

Search query

“Snippets” Results

Organic Result

Organic Video Result

Is The Allianz 222 The Right Annuity For You?

Compare this against other top annuities to ensure you're receiving the best benefits and income with the highest guarantees right now.

[Click Here To Find Out Now!](#)





jackson national perspective ii

All News Shopping Maps Videos More Settings Tools

About 815,000 results (0.37 seconds)

Introduction - Perspective II | Jackson - Jackson National

<https://www.jackson.com/products/variable-annuities/perspective-ii/introduction.xhtml>

With these challenges in mind, **Jackson**® offers **Perspective II**, one of America's top-selling* variable annuities that offers you the freedom to create your own distinctive portfolio plan with quality investments, optional benefits[†], and tax deferral[‡]. It's a retirement investment vehicle designed to let you adapt your investment ...

Product Details

Product details for the Perspective II Variable Annuity including ...

Benefit Options

Retire on your terms with Perspective II's optional living ...

Performance Center

Performance and Morningstar data for Jackson's Perspective II ...

Disclosure Documentation

Disclosure documentation for the Jackson Perspective II product.

Investment Options

Find out more about the 90+ investment options and different ...

Educational Library

To learn more about Perspective II variable annuity, explore ...

[More results from jackson.com »](#)

Jackson National

<https://www.jackson.com/>

At **Jackson**, we understand that building the financial future you want starts today. We offer a variety of products designed to help you pursue your most important long-term goals.

Independent Review of the Jackson National Perspective II Variable ...

Jackson National Perspective II Variable Annuity Review - What you'll find is that like all variable annuities, the Perspective II does some things well, but there are some limitations that you should be aware of.

Standard & Poor's Rating: "AA" (Very Strong) **Product Name:** Perspective II Variable Annuity
Type of Product: Variable Annuity

Is The Jackson National Perspective II The Right Annuity For You?

Compare this against other top annuities to ensure you're receiving the best benefits and income with the highest guarantees right now.

[Click Here To Find Out Now!](#)

No Pressure. No Hype. No Shenanigans ;)



2. Conversion Funnel

Use multiple sales funnel structures to attract retirees and annuity prospects based on their **biggest retirement challenges**.

FREE GUIDE

15 Little-Known Tips For Finding The Right Annuity For You

Sign Up now and get started with the guide.

REGISTER NOW

The Truth About Variable Annuities

The Top 10 Questions you MUST Know To Avoid The Devastating Impact of Little-Known Fees On Your Retirement

Download Your Free Guide

STEP 1 > STEP 2 > STEP 3 > STEP 4 > STEP 5 > STEP 6 > STEP 7

Is an Annuity Right For You?

Find out if an annuity is right for you in under 30 seconds...

Are You a Man or Woman?

The reason for asking, is because men and women have different payout factors based on their living expectancy)



I'M A MAN

Man



I'M A WOMAN

Woman

Exclusive Online Retirement Workshop

The 4 Critical Steps To Securing Your Retirement Happiness In 2020 And Beyond.

Register For Workshop Now

Act Fast - Online Workshop Spots Fill Up!

Presenter
Best presenter has spent the last 25 years helping families maximize their retirement income.

Wednesday, January 3rd
12 pm Eastern / 11 am Central / 10 am Mountain / 9 am Pacific Time

Limited Spots!
Reserve Yours Now

What You're Going To Discover On This Free Online Workshop:

- Identify the most common retirement planning mistakes
- How to keep your money secure and maximize your income throughout retirement
- How to be prepared for the next market crash

Register For Workshop Now

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Select timezone...

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Enter Your First Name

Enter Your Email Address

REGISTER NOW >

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Instant Annuity Rates! Shop The Top Annuities To Find Highest Rates!

Find the Highest Annuity Rates Online

- ✔ Get customized quotes from highly rated companies
- ✔ Compare guaranteed, consistent monthly income quotes
- ✔ Gain confidence knowing money is secure



Get Informed BEFORE You Buy An Annuity...

Compare the top annuity rates based on your retirement needs.

Get to know all your options BEFORE you purchase an annuity. Getting access to this information could SAVE you thousands of dollars in unnecessary fees and ensure that you get the HIGHEST income guarantees!

This special annuity report will provide you up-to-date rates and a fee analysis personalized on your financial situation and your state.

- Discover which annuities have the highest fees
- See why many retirees are choosing a special class of annuities that produce the highest monthly incomes
- How to secure your money from any stock market swings

Fill out the form to the right with your personalized information.

Find the Best Annuity Rates in Your State

 **Get The Report Now!**

Fill out the form below

First Name

Last Name

Zip Code

Date of Birth

Email Address

Phone Number

[Click Here For Your Free Quote](#)

Get Your Free Quote

Exclusive Online Retirement Workshop

The 4 Critical Steps To Securing Your Retirement Happiness In 2020 And Beyond.

[Register For Workshop Now](#)

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Our Presenter

Our guest presenter has spent the last 25+ years helping families maximize and secure their retirement income.



Wednesday, January 3rd

12 pm Eastern / 11 am Central / 10 am Mountain / 9 am Pacific Time



Limited Spots!

Reserve Yours Now

REGISTER TO THIS EVENT

Convert to other timezone

[REGISTER NOW >](#)

Your details will be forwarded to the webinar organizer, who might communicate with you regarding this event or their services

Here's What You're Going To Discover On This **Free Online Workshop**:

How to avoid the most common retirement planning mistakes

How to keep your money secure and maximize your income throughout retirement

How to be prepared for the next market crash

[Register For Workshop Now](#)

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

STEP 6

STEP 7

Is an Annuity Right For You?

Find out if an annuity is right for you in under 30 seconds...

Are You a Man or Woman?

(The reason for asking, is because men and women have different payout factors based on their living expectancy)



Man



Woman

[ABOUT](#)

[CONTACT US](#)

[ANNUITY REVIEWS](#)

[TERMS & CONDITIONS](#)

Annuity product guarantees rely on the financial strength and claims-paying ability of the issuing insurer. Annuity riders may be available for an additional annual premium that can provide additional benefits and income guarantees. The information on this Web site or in emails is designed for educational purposes only. It is not intended to be a substitute for tax, legal or accounting advice. By contacting us you may speak with an insurance licensed agent in your state, and you may be offered insurance products for sale.

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

STEP 6

STEP 7

Which best describes your situation:



Married



Single

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

STEP 6

STEP 7

What Is Your Age Range?



I'm Under 50



I'm Between 50 and 54



I'm Between 55 and 60



I'm Between 60 and 64



I'm Between 65 and 70



I'm Over 70

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

STEP 6

STEP 7

Are you retired?



Yes



No

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

STEP 6

STEP 7

When it comes to Men, Who Are Married, Under the Age of 50, Who Are Retired,
Tend To Fall Into 1 of 4 Categories.

**Which of the Following Categories Best Describes Why You Are Considering An Annuity
The Most (if you had to pick one)?**



I Want Income Now: I want to supplement my current income with an additional income stream starting immediately or some time later this year.



I Want Income Later: I want to supplement my current income in the future (3, 5 or 10 years later down the road).



I Want To Safely Grow My Money: I want principal protection of my money with a reasonable rate of return and access to my money.



I Want Legacy Planning Benefits For My Heirs: I don't need access to a portion of my money during retirement, and would like to leave the money to my children, grandchildren or a charity.

**Based on your answers, we've prepared a custom annuity report
and determined if an annuity is right for you...**

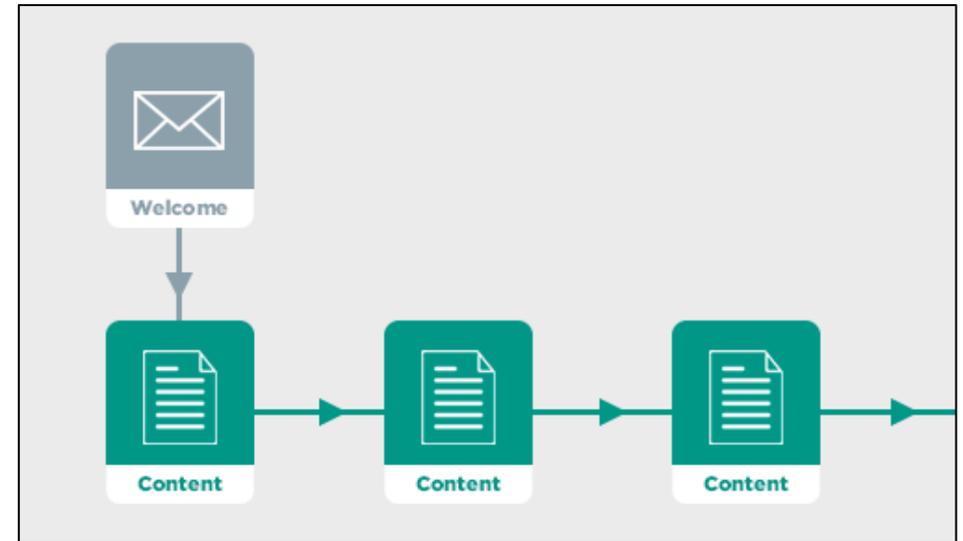
To access your custom annuity report and see if annuity is right for you
simply enter your email below:

CONTINUE

3. Sales Sequence

Send prospects through a “psychic sales” email sequence over the course of 7-10 days based on which conversion funnel they came through.

The emails should inform, educate and inspire prospects to take action by getting prospects to request an appointment with you.

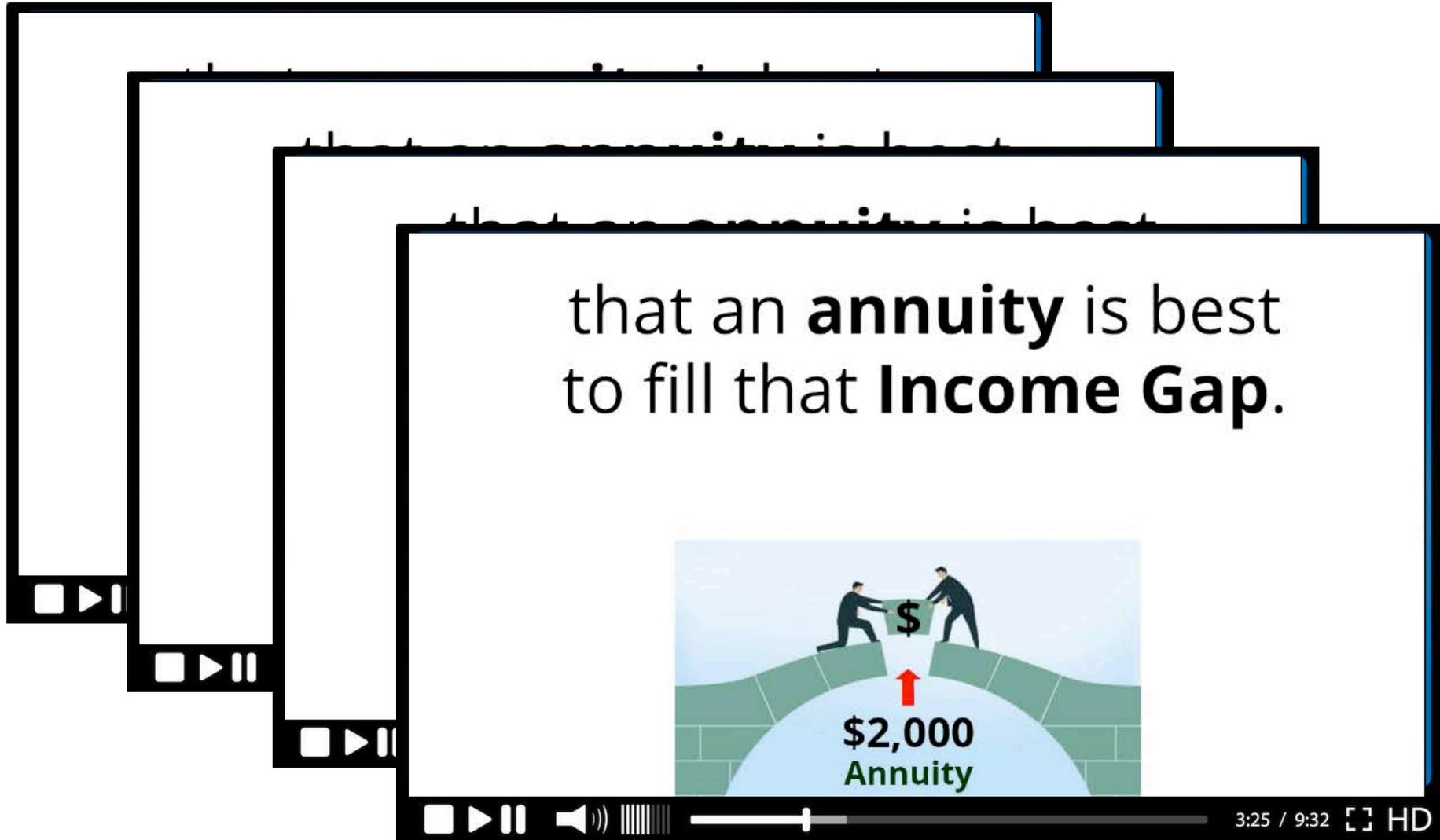


See How You Can Get More Income,
And Safely Grow Your Money
Regardless of Market Conditions
So You Can Retire With Confidence

[Click Here To Learn More](#)

No Pressure. No Hype. No Shenanigans ;)

Custom Video Presentations



Income Stream Starting Immediately Or Some Time Later This Year

Make sure your sound is turned on! (also please wait up to 10 seconds for the video to load)



Discover A Smarter And Easier Way To Find Which Annuity Is Right For You And Maximize Your Retirement Income - Click The Button Below To Learn More

Click Here To Discover How To Get More Income, Safe Growth And Preservation Throughout Retirement

How To Supplement Your Current Income In The Future ...3, 5 or 10 Years Later Down The Road

Make sure your sound is turned on! (also please wait up to 10 seconds for the video to load)



Discover A Smarter And Easier Way To Find Which Annuity Is Right For You
And Maximize Your Retirement Income - Click The Button Below To Learn More

**Click Here To Discover How To Get More Income, Safe
Growth And Preservation Throughout Retirement**

How To Safely Grow Your Money, While Protecting It From Stock Market Volatility

Make sure your sound is turned on! (also please wait up to 10 seconds for the video to load)



Discover A Smarter And Easier Way To Find Which Annuity Is Right For You And Maximize Your Retirement Income - Click The Button Below To Learn More

Click Here To Discover How To Get More Income, Safe Growth And Preservation Throughout Retirement

How To Leave Behind Legacy To Your Heirs

Make sure your sound is turned on! (also please wait up to 10 seconds for the video to load)



Discover A Smarter And Easier Way To Find Which Annuity Is Right For You
And Maximize Your Retirement Income - Click The Button Below To Learn More

**Click Here To Discover How To Get More Income, Safe
Growth And Preservation Throughout Retirement**

[Email #1 - Results Email](#)

[Email #1B - Promotes the 5 minute explainer VSL](#)

[Email #2 - Results Email](#)

[Email #3 - Content Email](#)

[Email #4 - Content Email](#)

[Email #5 - Results Email](#)

[Email #6 - FAQs](#)

[Email #7 - Time's Up](#)

Here's your custom income later Annuity Video Report ▷ Inbox x 

Fri, Feb 15, 7:25 PM (5 days ago)  

Here's Your Custom Annuity Report Based On Your Annuity Quiz Answers

We've analyzed your answers to the Annuity Profile Type Quiz we've identified what we believe to be your **Annuity Profile Type**.

Now what comes next could be a big eye opener for you...

You see, most people never consider their Annuity Profile Type when they're researching and thinking about buying an annuity.

And they don't realize that as a **single woman who is retired, between 50 and 54 years of age**, how not knowing your Annuity Profile Type could pose a grave risk to your retirement...

Now in your case, based on everything you've told us...

[Click Here To Learn Why Choosing The Wrong Annuity Type May Adversely Affect Your Retirement And Financial Future](#)

This is unlike many annuity recommendations...

We know this can all start to sound a little scary but the good news is that unlike many of the annuity recommendations that are one-size-fits-all, **you can quickly identify which annuities are the best options for you to consider without having to speak with a high-pressured financial salesperson.**

[Click here to discover the right annuities that provide the best income later benefits](#)

Wishing you financial security and happiness,

P.S. If you're looking for a smarter and easier way to find the [best income later annuities then click here to learn more.](#)

P.P.S. If you have a second, we'd love to know: Why did you take our Annuity Quiz? What can we do to help you solve your biggest problem right now? Just reply to this email and let us know.

See How You Can Get More Income,
And Safely Grow Your Money
Regardless of Market Conditions
So You Can Retire With Confidence

[Click Here To Learn More](#) 

No Pressure. No Hype. No Shenanigans :)



4. Lead Capture

Drive prospects to request an virtual appointment by extending a compelling offer.

Frame the appointment as “friendly conversation.” This typically yields a higher quality lead and conversation with the you as the advisor.

Step 1 of 2

50%

Did you know you can get free Annuity and Retirement Income Planning feedback without having to talk to a high pressure sales agent?

You can! And it's really easy. Just use the form below and one of the AnnuityGator.com team members will personally answer your questions usually within 24 hours.

Your information is 100% confidential and your email will never be spammed! Just a friendly response to answer your questions and help point you in the right direction.

What's the biggest question that have about annuities? *

Please be as specific as possible...The more specific and detailed you are, the more likely we'll be able to help!

How do we get in touch with you?

Name *

Email *

Phone *

SUBMIT YOUR QUESTION

WATCH VIDEO | **STEP 2: REQUEST DEMO** | STEP 3: CONFIRM

Request Your Live Visual Web Demo
Discover A Smarter And Easier Way To Secure Your Dream Retirement

It. No Pressure. Just The Straight Answers YOU Need For Retirement!

Your First Name Here... 

Your Email Here... 

Your Phone Number Here... 

→ Request My Demo Now!

Have \$412,000 in 401K and would like to roll over to a secure investment (tax deferred intact). Tax Accountant recommended American Equity Gold claiming that:

Principal is Secure

4% rate

Can fluctuate withdraws as need

Receive a 10% bonus for signing up

Ability to have spouse receive death benefits of lump sum payout, roll over to own contract, or keep receiving payments.

Ability to have beneficiaries receive either lump sum payout or roll in their own IRA (tax deferred)

No fees or administrative charges

My question - are these claims factual? Also, if we start with only \$1,300 per month payouts, what will the remaining principal balance be at the end of 33 years?

Husband is the owner of 401K (former employer). He is 61 years old and will be retiring in 10 months at age 62. He is no longer employed by the holding employer.

Also, is there another product to consider? We are able to adjust/modify payouts needed - we are flexible on this aspect. We want something secure (no mutual funds, S& P, etc.) What we are truly looking for is to maintain a substantial amount of the principal for our children to inherit.

Subject

American Lifetime Income Benefit Rider

Questions or Comments

My wife and I read through your review and listened through the video. We still don't claim to have a great understanding how good a decision this is for us. Our situation is that we plan to retire in just over a year. We are both about 60. We are considering moving money from a work IRA into an American LIBR that would start paying out in 10 years. Our total net worth is about 3 Million so if we invest 500,000 in a LIBR we should have enough to get through the initial 10 years but are still just wondering about this decision. When I read through the 'where it works best' list that leads me to thinking it is a good tool for us. My main concern is not being 'sold' something. Sorry to go on but I guess my questions are: Are there any major changes to this LIBR since your article and video were made? For what I am talking about, waiting 10 years can you give an estimate of the actual return rate? Our proposal has a Well Being Payment that doubles the payout if 2 of the 6 life function are gone. Are you familiar with that and is it worth buying?

Thanks,
Tim

State of Residence

Minnesota

Subject

considering income annuity

Questions or Comments

we are 65, retired, no debt, have 30k/yr soc sec income, need another 30k/yr income. have 450k in ira and 450k in mmkt tbills. nothing in stks and bonds or other assets. plan is to diversify after the next crash. question is what is best way to live off the interest ($900k \times 4\% = 36k/yr$).

State of Residence

Arizona

Subject

Index annuity

Questions or Comments

Age 72, need safe income of an additional \$2600/ mo

What products pay the highest % annual lifetime withdrawal guaranteed?

Then which products offer the best % of S&P participation for growth for a 2 nd annuity?

Maybe \$400k in each

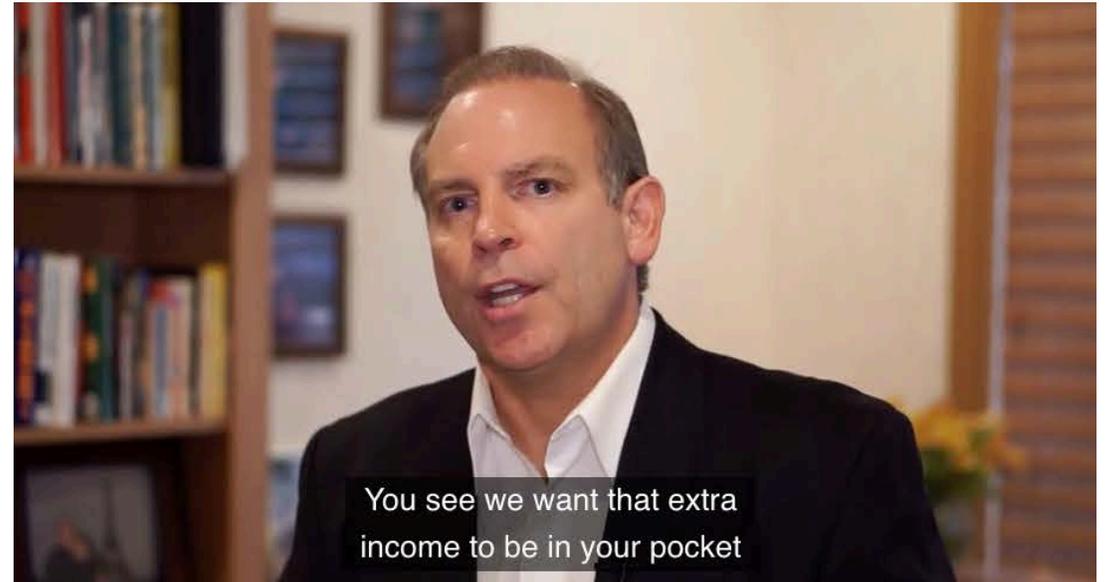
5. Self-Schedule (Custom Sales Funnel)

Once the lead is generated deploy a customized campaign that welcomes the prospect with a video and email sequence to encourage them to schedule a 1st appointment on your calendar.

[Email #1 - Contact Us Confirmation Email](#)

[Email #2 - Contact Us Confirmation Email](#)

[Email #3 - Schedule Meeting Time](#)



Thank You For Requesting Your Personalized Web Demo Of Our Annuity Ranking Software

Confirm Your Web Demo By Booking A Time On The Calendar Below



We're looking forward to connecting with you, but there's just one final step that you need to complete in order for us to confirm your Web Demo request and help you secure your dream retirement.

Go ahead and book your time on the calendar below so that we can chat and point you in the right direction.

Personalized Web Demos are scheduled on a first come, first serve basis and we only have a limited number of time slots available each week.

Due to the increased demand, we recommend that you click on the button below and book your live demo right on the calendar to secure your spot, which takes about 30 seconds.

Start by selecting your local time zone below:

Pick a date and time

Duration: 60 minutes

Your time zone: Please select

Your time zone

All times will be displayed according to your time zone:

Canada



Atlantic Time - not observing DST (Blanc-Sablon) (GMT-4:00)



Continue

Start by selecting your local time zone below:

Pick a date and time

Duration: 60 minutes

Your time zone: Please select

Your time zone

All times will be displayed according to your time zone:

United States



Arizona (GMT-7:00)



Eastern time (GMT-5:00)

Central time (GMT-6:00)

Mountain time (GMT-7:00)

Arizona (GMT-7:00)

Pacific time (GMT-8:00)

Alaska (GMT-9:00)

Alaska (Aleutian Islands) (GMT-10:00)

Pick a date and time

Duration: 60 minutes

Your time zone: United States; Arizona (GMT-7:00) ([Change](#))

February 2019							< >	Available starting times for Thu, Feb 21, 2019	
Mon	Tue	Wed	Thu	Fri	Sat	Sun	AM	PM	
				1	2	3	9:00 AM	12:00 PM	
4	5	6	7	8	9	10	10:00 AM	1:00 PM	
11	12	13	14	15	16	17	11:00 AM	2:00 PM	
18	19	20	21	22	23	24		3:00 PM	
25	26	27	28						
< January								March >	

Pick a date and time

Duration: 60 minutes

Your time zone: United States; Arizona (GMT-7:00) ([Change](#))

February 2019							< >	Available starting times for Thu, Feb 21, 2019	
Mon	Tue	Wed	Thu	Fri	Sat	Sun	AM	PM	
				1	2	3	9:00 AM	12:00 PM	
4	5	6	7	8	9	10	10:00 AM	1:00 PM	
11	12	13	14	15	16	17	11:00 AM	2:00 PM	
18	19	20	21	22	23	24		3:00 PM	
25	26	27	28						
< January							March >		

Provide information

[Change selection](#) 

Time

Thu, Feb 21, 2019, 9:00 AM - 10:00 AM ([Change](#))
United States; Arizona (GMT-7:00) ([Change](#))

Data we already have

-  Your Name
-  Your Email
-  Best Phone Number To Reach You At

What's the biggest challenge you're facing right now when it comes to your retirement?

I want an annuity that gives me growth for the next 3-5 years and then convert to a monthly income, and the amount is \$300,000

Done

Email #1 - Contact Us Confirmation Email

From: Terry Heys

Subject: Hey, {FIRST NAME} thanks for requesting your MAP demo

Note: *Send after*

Body:

I wanted to reach out to you real quick and thank you for requesting your private MAP Demo. We do our best to respond to everyone in the order we received their requests and we will definitely be in touch with you soon.

I have a limited amount of time slots available to host your live MAP demo. Please be advised that my calendar tends to book up quickly, so if you want to hold your spot to speak with me you need to click the link below to request a time for us to chat.

<http://meetme.so>

Talk Soon,
Terry

P.S. {FIRST NAME} can you do me a favor?

When you select a time on the calendar, please make sure that you'll be available at that time. That way we can ensure we are available to help as many people as possible.

Thanks for being mindful of our calendar. We respect your time, as we're sure you respect ours. :-)

Again, here's the link to my private calendar for your convenience so we can chat and point you in the right direction:

<http://meetme.so>

Email #2 - Contact Us Confirmation Email

From: {ADVISOR NAME}

Subject: Did You Miss This {FIRST NAME}?

Note: *Wait 60 minutes (one hour)*

Body:

Did something go wrong?

You can go back to our meeting scheduling page by clicking the link below:

[Click Here To Reserve Your MAP Demo](#)

If you want to see a visual step-by-step example of how to get inflation-adjusted income on autopilot, while growing your money and preserving 100% of your principal to secure your retirement, you definitely want to take advantage of this opportunity.

So, please go and reserve your meeting time here:

[Reserve Your MAP Demo >>](#)

Talk Soon,

Terry

Email #3 - Schedule Meeting Time

Subject: FINAL NOTICE - {FIRST NAME}

Note: *Wait 24 hours*

Body:

Thanks, {FIRST NAME}, for requesting your Master Annuity Plan (MAP) Demo.

Below is a link to my calendar to reserve a time for us to have a quick chat.

Please take a moment to book a time that works well for your schedule so you can see a visual, step-by-step example of exactly how to setup a diversified "Master Annuity Plan" so you can retire comfortably.

[Reserve Your MAP Demo >>](#)

(My calendar has been filling up quickly, so please book a time with me ASAP!)

Cheers,

Terry

Pick a date and time

Duration: 60 minutes

Your time zone: United States; Mountain time (GMT-7:00) ([Change](#))

March 2018 < | > Available starting times for **Thu, Mar 08 2018**

Mon	Tue	Wed	Thu	Fri	Sat	Sun	AM	PM
			1	2				
5	6	7	8	9				
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< February April >

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4:00 PM

6. Indoctrination (Custom Sales Funnel)

Once the prospect schedules the appointment send a fully customized indoctrination campaign to get the prospect to know, like and trust you.

This campaign will set the right expectation for the prospects along with educational content and background information on the advisor to "warm" up the prospect for the 1st appointment.

[Email #1 - Your meeting is confirmed](#)

[Email #2 - I'm looking forward to meeting with you](#)

[Email #3 - Talk to you soon {FIRST NAME}](#)



**Welcomed
Guest**

vs

**Annoying
Pest**

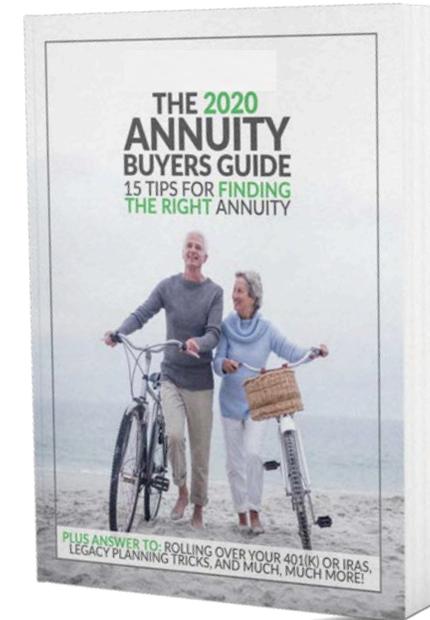
Thank You For Booking Your Meeting Time

Make sure your sound is turned on! (also please wait up to 10 seconds for the video to load)



Confirm The Appointment & Educate The Prospect

- Set the right expectations for the meeting and get the prospect to anticipate the appointment.
- Answer frequently asked questions to help you close more business.
- Send the prospect links to download white papers, lead magnets or reports
- Encourage them to more videos about annuities and retirement income planning



Email #1 - Meeting Confirmation - (Immediately)

Subject: {FIRST NAME}, Your Scheduled Meeting Time Is Confirmed

Note: TBD

Body:

Hey {FIRST NAME},

Thank you for scheduling your meeting to chat with me about annuities. My name is {ADVISOR NAME} and I'm excited to chat with you about annuities so I can point you in the right direction.

Below are the details for our scheduled meeting time:

Your Meeting Time is on {ENTER DATE & TIME}

We'll be calling you at the number you provided: **{ENTER PHONE NUMBER}**

You'll want to have access to a computer when we meet so that I can share our proprietary annuity review process with you right through your computer.

Please reserve this time on your calendar. You may add it by clicking on the calendar links below:

[Add to Outlook Calendar](#)

[Add to Google Calendar](#)

[Add to Apple Calendar](#)

[Mobile and other calendars](#)

What makes our proprietary process so unique? We have developed a scientifically sound approach to evaluating annuities.

you come into this call knowing who is speaking with you, please kindly take a moment to [click here and learn more about me and my background](#).

I look forward to chatting with you soon!

Best Regards,

Talk Soon.
Terry



P.S. One last thing, please be sure that you will be available at our scheduled time to chat. That way I can ensure I'm helping as many people as possible, it's my job and it's what I do.

Thanks for being mindful of my calendar, I respect your time as much as I'm sure you respect mine. :-)

You can [reschedule or cancel our meeting time by clicking here](#).

Meet Terry

For over 25 years, Terry Heys has been a leading expert in financial and retirement planning. Spending time on Wall Street as a financial advisor for Merrill Lynch for over a decade and as a first vice president of Smith Barney, Heys felt a stronger calling. This calling came in the form of creating a private practice that truly educates and empowers his clientele to make the best decisions for their financial future. Sound Financial NW was formed in 2004.

Through Heys extensive education he has become nationally recognized resource for media outlets about the benefits of annuities. "Lifetime income is a concern that keeps Americans up daily," Heys said. "After all, every time you turn on the TV all you hear about is how so many people are outliving their money. It's truly time for American's to change the conversation about retirement. They need to know there are options that will allow them to have peace of mind moving into the years they've worked so hard for." Heys formed www.allaboutannuities.com as a resource center for Americans to understand more about the power of an annuity.

Heys takes great pride in working with individuals and couples on reaching their retirement goals. Heys also is well versed in industries specific to employees working in the federal government, education, medical and corporate arenas.

A life long Washington State resident, Heys currently resides in Woodinville, Washington with his wife and two daughters.



Email #2 - 1st Meeting Reminder (24 Hrs)

Subject: {FIRST NAME} I'm looking forward to our MAP Demo

Note: Send 24 hours prior to meeting

Body:

Hey FIRST NAME,

It's Terry Heys again with a friendly reminder that we'll be meeting tomorrow:

{ENTER DATE & TIME}

I will be calling you at **{ENTER PHONE NUMBER}** at our scheduled meeting time. Please make sure that you have access to a computer when we meet so that I can share my computer screen with you.

I'm looking forward to our MAP Demo and to pointing you in the right direction. If you would like to learn more [about me and my background, feel free to click here.](#)

Best Regards,
Terry |



P.S. If you can't make our meeting you can simply [reschedule or cancel our meeting time by clicking here.](#)

that an **annuity** is best to fill that **Income Gap**.



ANNUITY BUYERS GUIDE

Does Your Retirement Have The Happy Factor?

15 TIPS FOR FINDING THE RIGHT ANNUITY

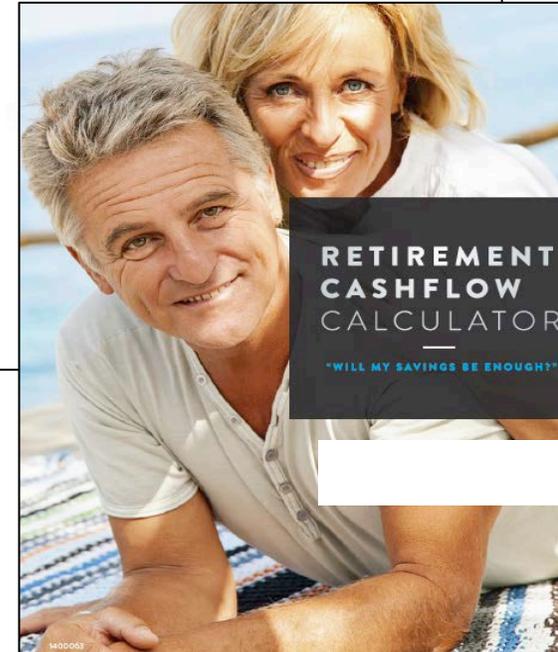


PLUS ANSWER TO: ROLLING OVER YOUR 401(K) OR IRA'S, LEGACY PLANNING TRICKS, AND MUCH, MUCH MORE!

INDEPEDENT CONSUMER REPORT

The Truth About Variable Annuities 8 Cautionary Warnings That You MUST Be Aware Of

Plus Discover The Top 10 "Little-Known" Variable Annuity Fees That May Have A Devastating Impact On Your Retirement



7. Personalized Follow-up (Custom Sales Funnel)

Keep prospects engaged and “top of mind” by sending on-going weekly nurture emails to all of your prospects.

Maintain warm relationships with your prospects and continue to build value and goodwill until they are ready to work with you.

Set it up to be completely automated and released each week on behalf of the advisor and with call-to-actions linked directly to book on your calendar.

What Is A Guaranteed Living Withdrawal Benefit And Why Would You Want One?



Variable annuities are often sold with guaranteed living withdrawal benefits, also known as the GLWB or other similar acronyms.

In a nutshell, these benefits give you a way to stay invested in the stock market with some income guarantees in place. These benefits became popular after the market crash of 2008 when people were looking for a way to protect their retirement savings from market loss.

In theory, these benefits may sound good, but they can be very costly, and in many cases, it's the insurance company who might be coming out ahead.

Here is what you need to know about the methods used to calculate these benefits so that you can decide for yourself: checkmate, stalemate, or just a losing proposition?

[Click here to read more about it](#)

Enjoy,



Nigel Valdez
Annuity Gator Income Planner & Licensed Advisor

P.S. Do you have an annuity question? [Click here to book a time for us to chat.](#)

Need Help Buying An Annuity?
Let me answer any questions that you have about annuities and point you in the right direction.

[Book A Time To Chat Now](#)

No Pressure. No Hype. No Shermanigans. J



Personalized Nurture Email Broadcasts

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Enjoy,



P.S. Do you have an annuity question? [Click here to book a time for us to chat](#)

Need Help Buying An Annuity?

Let me answer any questions that you have about annuities and point you in the right direction.

[Book A Time To Chat Now](#)

No Pressure. No Hype. No Sheranigans :)



Personalized Email Follow-Up Broadcasts

3 Reasons Why An Income Rider May Be A Bad Idea



Growing up we're often taught to eat everything on our plate. There are ways to get around this if you happen to have a dog, but if you don't, then you might have to get a little creative.

Income riders are sold with annuities as an add-on feature like anchovies on your pizza or extra cheese. In some cases, income riders are misrepresented by annuity salespeople so investors end up with a feature they don't even want or need; in other cases, they can solve the income problem by giving you more flexibility and guarantees.

In theory, these benefits may sound good, but they can be very costly, and in many cases, it's the insurance company who might be coming out ahead.

Here is what you need to know about the methods used to calculate these benefits so that you can decide for yourself: checkmate, stalemate, or just a losing proposition?

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Enjoy,



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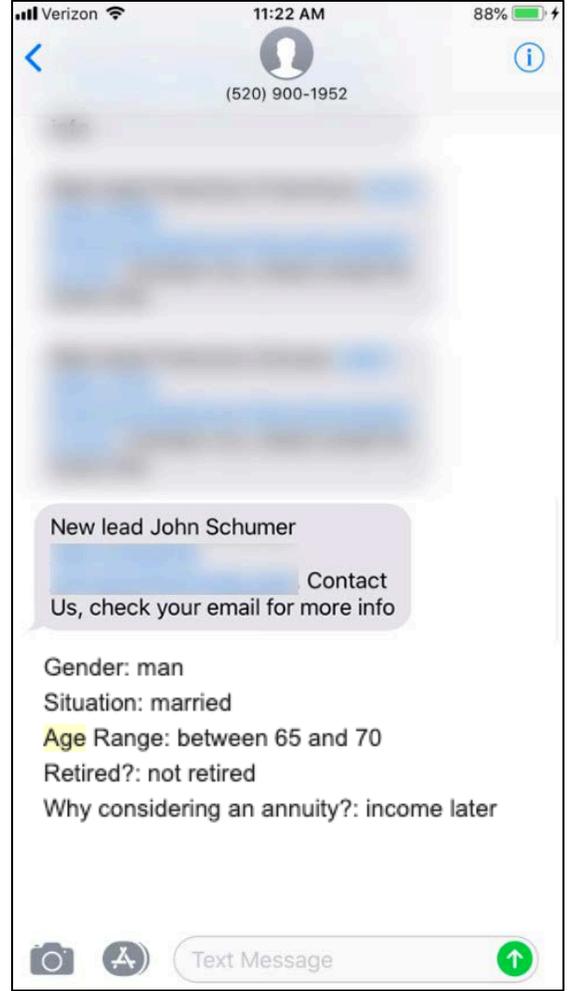
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Recap: 7-Step Digital Marketing Framework

1. Traffic
2. Conversion Funnels
3. Sales Sequence
4. Lead Capture
5. Self-Schedule
6. Indoctrination Campaign
7. Personalized Follow-up



**Imagine being able to predictably
attract annuity prospects and
close business without ever having
to meet with them in person.**



AIM | ADVISOR
INTERNET
MARKETING

Annuity Leads-on- Autopilot Program



www.AdvisorInternetMarketing.com/Apply