

AIM



HOW TO ATTRACT ENDLESS ANNUITY PROSPECTS AND CLIENTS AUTOMATICALLY

THE SECRETO GROWING YOUR PRACTICE IN THE DIGITAL AGE

BY JOVAN WILL

TABLE OF CONTENTS

- 03 Preface
- 04 Most Of What Advisors Have Been Taught Is Dead Wrong
- 07 There's A Battle Being Waged For Your Business
- 09 The Problem With "Old School" Marketing Approaches
- 10 How To Overcome Having "Annuity Breath" With Prospects
- 13 Your Real Competition Is Invisible
- 15 The Truth About Digital Marketing For Financial Advisors
- 17 The Rise And Proliferation Of The Self-Proclaimed Digital Marketing "Guru"
- 22 How Advisors Are Trading One Mousetrap For Another
- 25 What Do You REALLY Want?
- 25 A New Breed Of Financial Advisors Is Emerging
- 27 What Does Your Dream Business Lifestyle Look Like?
- 30 How We Help Financial Advisors Grow Their Business
- 32 Here's How To Learn More
- 33 The Three Specific Questions To Ask Your Marketing Provider (Or FMO)
- 34 Free Bonus Resources To Help Advisors Succeed In The Post-Pandemic World

**[CLICK HERE TO LEARN MORE ABOUT OUR DONE-FOR-YOU
ANNUITY LEAD GENERATION PROGRAM](#)**

PREFACE

How can advisors effortlessly attract qualified annuity prospects in the Digital Age?

Although dinner seminars, retirement workshops, and educational classes are still viable today around the country; many advisors are still struggling to adapt their practice to the ever-changing needs of the consumer marketplace.

My mentor, Robert Kiyosaki, would say that the greatest opportunity in history to grow businesses and serve people well is during times of crisis.

Sadly, most FMOs and marketing agencies are ill-equipped and unprepared at helping financial advisors adapt to the market changes prompted by the pandemic — leaving many advisors scrambling to figure out where to go from here.

I've personally helped financial advisors implement some of the most successful lead generation programs in our industry. After working in this industry for over a decade, this is the first time I've created a report that clarifies how we leverage digital marketing to generate leads and qualified appointments for virtual advisors.

My hope is that this report will offer you some guidance on how to transition your practice to succeed in this ever-changing world and provide insights into the types of marketing methods that you may want to consider during these uncertain times.

You're about to discover a better and smarter way to build a wildly profitable business, and how to grow your practice with more freedom and ease.

Sincerely,

Jovan Will



Jovan Will
Co-founder, AIM

WHY FINANCIAL ADVISORS ARE ABANDONING TRADITIONAL METHODS, AND USING A NEW MODEL TO GENERATE MORE REVENUE AND GAIN MORE FREEDOM THAN EVER...

FROM THE DESK OF JOVAN WILL

SUBJECT: "IN TIMES OF CRISIS, CHANGE IS ACCELERATED."

Are you looking for more predictable ways to get in front of qualified prospects? Would you like to consistently close new business while building a highly profitable practice around your schedule and lifestyle?

Are you tired of traditional "old-school" approaches that flat out don't work like they used to?

Most of what financial advisors have been taught about building a successful financial practice is DEAD WRONG...especially in today's day and age.

The times have changed, and what I'm about to share with you may upset some, but will help countless others.

Let's face it, our industry is changing fast...clients are more resistant to traditional marketing (and more skeptical than ever before due to a lack of trust in our industry).

The pandemic has forever changed the way Baby Boomers buy goods and services and connect with friends and family (which even includes how they are seeking financial advice).

The purpose of this report is to warn you, or at least make you aware of some very unsettling trends that need your immediate attention if you plan to prosper in the post-pandemic world.

SIDEBAR

Later in this report, I'll also reveal to you the 3 specific questions that every financial advisor MUST be aware of before you work with any digital marketing service provider.

Well, the truth of the matter is that the traditional "old school" marketing tactics and business building approaches flat out don't work for the average advisor anymore.

Sadly, most advisors aren't aware of the alternatives (and some marketing organizations would rather keep it that way).

I know you've experienced the symptoms. In fact, I can almost guarantee they are plaguing your business at this very moment. But what you might not see or fully understand is the cause behind the symptoms.

CAN YOU RELATE TO ANY OF THE FOLLOWING?

- You're getting a dwindling response from traditional "old school" approaches to getting in front of more qualified prospects (i.e. direct mail, dinner seminars, client appreciation events, educational classes, radio advertising, etc.).
- You're promised to have your calendar flooded with FREE qualified annuity appointments — only to find out you need to be a "captive" agent and give up over 50% of the commission (and based on closing \$5MM in FIAs, you would be giving up \$175K+ from your commissions!).
- You're being recruited into a preset appointment and lead program that is using national radio campaigns (it's obvious that radio advertising is a dying breed of marketing and increasingly more difficult to accurately target ideal prospects than it was in previous years).
- Your FMO has made big, bold promises to help you grow your practice (but all you have to show for it is a fancy website and pretty logo that produces ZERO leads).
- You've hired a digital marketing agency or consultant to build websites, blog posts, videos, and "compliant" nurture emails that have produced dismal results (they haven't helped you get in front of more qualified clients).
- You were led to believe by a digital marketing "guru" that you could easily learn how to set up Facebook ads, launch LinkedIn outreach campaigns, and build websites yourself, only to be left frustrated with all the implementation challenges (why should you be building website sales funnels, when you should be meeting with clients?).
- You've bought expensive, but lousy Internet leads, or called leads that have been resold to several different advisors (because these leads are "generic", they do not trust you nor do you have any relationship or credibility with them).
- Are you feeling more than ever like you're simply chasing one "unproven" marketing idea after another, hoping the next one will actually work?
- Have you ever lost a large case to an advisor that your client found online (even after you've done all the hard work)?

If so, I hear you my friend — and you're not the only one. Right now, more than ever, achieving predictable long-term results in our industry can be a struggle due to the pressing changes prompted by the COVID-19 pandemic.

We all know that the cost and amount of work it takes to acquire a new client has increased while keeping existing clients loyal and happy has become increasingly difficult.

USING TRADITIONAL 'OLD SCHOOL' MARKETING IN THE DIGITAL AGE IS LIKE TRYING TO FILL A LEAKING BUCKET

You can get ahead of the curve for a while if you have the time, money, and energy, but it's only a matter of time before your efforts are drained out again.



In an industry where hype, smoke and mirrors, “dinner seminar systems” and rehashed sales scripts have become the norm, a growing trend is quickly emerging with a select few financial advisors who are sick of the same old dog and pony show.

TO MEET THESE CHALLENGES THERE’S A FIERCE BATTLE BEING WAGED



What I’m about to share with you is bound to ruffle some feathers for sure...

The system is rigged against you because there’s a battle being waged for your hard-earned dollars, commissions, and overrides. Let’s explore some of the most common ways advisors are getting help with their marketing right now:

No. 1 - FMOs

Their name FMO/IMO or (Field Marketing Organization) suggests they can help you market your practice; sadly most of these groups are better at marketing themselves than they are at helping you market your practice. Most FMO marketing ideas are decades old and include the typical “dinner seminar systems”, live workshops or classes, referral marketing, client appreciation events, partnering with CPAs, and the list goes on and on...

This type of traditional or PR marketing also includes: authoring a “best selling” book, buying media citations or getting featured on financial news shows.

No. 2 - Marketing Agencies

Their business model is predicated on their ability to sell you “more marketing services” (i.e. direct mail, FB ads, social media) independent of the results that they produce. Some of these companies may offer fancy \$20,000 “automation funnels” with custom professional videos that don’t actually consistently produce leads and appointments.

Our industry is now booming with digital marketing ideas to fill up seminars, retirement workshops, educational classes, and even webinars (both pre-recorded and live).

SIDEBAR

To my dismay, many of these programs have not actually been battle-tested in the field (heck, many of these FMOs were promoting old school marketing ideas until the pandemic “forced their hand” to adapt). The unfortunate result is that many advisors are now being used as guinea pigs to “test” out these new-fangled marketing ideas.

No. 3 - Digital Marketing “Gurus”

There are more self-proclaimed “marketing experts” advertising on Facebook than ever before, many of these “gurus” grossly oversimplify how easy it is to generate leads online with exaggerated and unverifiable testimonials (I’ll share more on this emerging trend later in the report).

No. 4 - National Lead Programs

There are a handful of national lead programs that combine traditional television and radio advertisements with digital marketing to generate annuity leads. Some of these organizations operate like a hybrid between an FMO and a retail annuity agency with both “in-house” employed agents and “outside” independent agents.

Independent advisors should be careful to avoid marketing programs where they receive the “leftover” leads, only after all the “highest quality” leads have been “cherry-picked” by “in-house” employed agents.

Furthermore, you may need to drive for endless hours each day to meet with prospects all throughout your “assigned” territory, and only get paid a reduced comp (less than half of the street-level commission from each annuity case closed).

Sadly, the aforementioned options above are either very expensive in dollars (or overrides and commissions) or require incredible amounts of time to figure everything out yourself (via technical implementation).

HERE'S THE MAIN PROBLEM WITH TRADITIONAL FMO MARKETING APPROACHES...

They're primarily based on decade-old paradigms on growing your business and are very expensive in dollars (or hard-earned commissions or overrides).

They are NOT scalable and rely on manual time and effort in order to make them work. I mean, how many dinner seminars can you realistically host per week, while still maintaining a healthy work-life balance? Do you really want to give up half of the commission for every annuity case that you close?

Most FMOs are still pushing advisors to host costly dinner seminars and live events or meet with prospects in person (in their homes or office) and don't factor in the extraordinary time investment required.

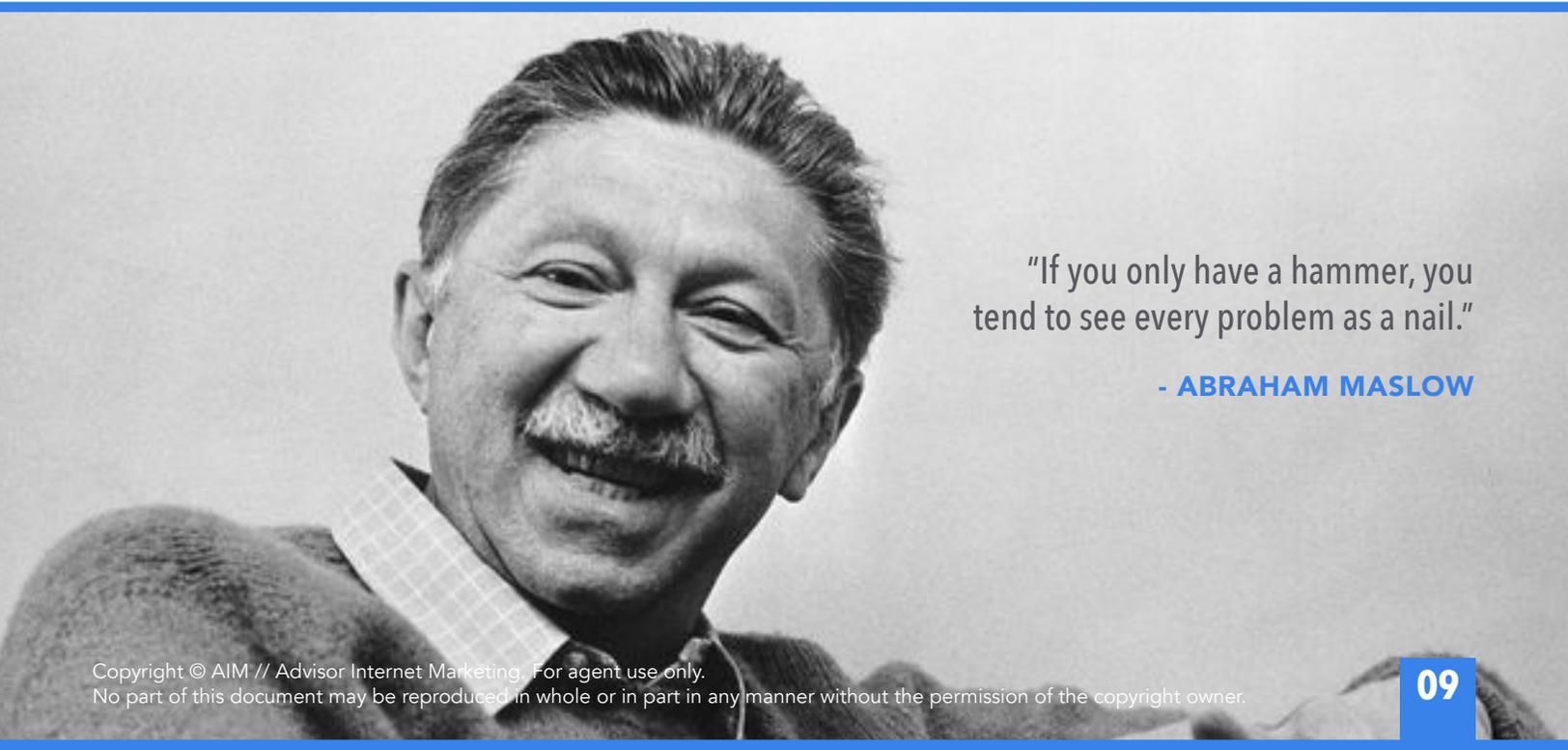
"DO MORE DINNER SEMINARS AND LIVE EVENTS!" is pretty much the only advice they give to financial advisors that can't get in front of enough qualified prospects.

In their defense, many of these FMOs have not really needed to evolve their marketing approach over the years, so they really don't have any other marketing ideas to offer.

Although dinner seminars are still a viable way (in some market areas) to get in front of more qualified prospects, the reality is that most advisors actually would rather NOT do them altogether. This also applies to our prospects and clients who would rather receive financial advice without having to leave their house or have an advisor show up at their front doorstep.

Who wants to spend evenings running around town pitching presentations in fancy restaurants and feeding strangers for free, without knowing if they'll turn into any business?

Let's face it, advisors resort to these archaic approaches because it's the only thing that their FMO is pushing them to do and so are many of the "top producers".



"If you only have a hammer, you tend to see every problem as a nail."

- ABRAHAM MASLOW



ARE YOU AFRAID OF HAVING 'ANNUITY BREATH'?

When I started offering marketing consulting in this industry a decade ago, I was shocked when I discovered why one financial advisor was afraid to mention annuities in his dinner seminar...

He told me he didn't want to have what he called, "Annuity breath..."

I was puzzled as to why that was the case, but after I critiqued his mailers I discovered that he never mentioned anything about annuities or income planning benefits...

Instead, the mailer touted new ways to optimize social security, estate planning tips, and generic retirement planning ideas (and yet all he really wanted to offer was annuities).

And that's when I uncovered the key to being able to consistently attract more qualified annuity prospects than ever before...

***Hint*, it's actually not as complicated as you might think.**

It's something that most advisors never think about when it comes to their own marketing.

Most of the financial advisors today are still afraid of having "annuity breath," which means that you need to talk about everything BUT annuities to get people to book appointments with you, and then hopefully "back-door" an annuity sale once you've earned the prospect's trust.



Marketing groups and FMO's have conjured creative ways to attract annuity prospects:

- Get unlimited referrals from Medicare and Medicare Supplement clients
- Generate Federal employee benefit leads
- Convert your LinkedIn connections into appointments
- Build your personal brand on YouTube with finance videos
- College planning leads
- Life settlement leads
- Exclusive territories available for estate planning leads

These methods of getting in front of qualified annuity prospects are incredibly inefficient and somewhat misleading, but still produce some results for advisors due to the high commissions associated with annuities (but we all know this won't last forever).

After launching some of the most successful annuity campaigns in our industry, I discovered a type of marketing that consistently works to attract ideal and qualified annuity prospects without scaring off prospects with "annuity breath."

I call it "Congruent Marketing."

It means that your marketing message is congruent to what you're actually offering; yeah, it sounds pretty obvious, but most financial advisors, (FMOs and marketing agencies and the like) often miss the boat when it comes to this.

Let's look at it another way...
If we were in the burger business and our customers
really want a greasy cheeseburger, then...

GIVE THEM THE FRIGGIN' GREASY CHEESEBURGER ALREADY!

Not some lame gluten-free, vegan, tofu sandwich!



The same principle applies in our industry, yet many advisors are still resorting to “bait & switch” tactics and gimmicks to sell more annuities because that’s what they’re being told to do by their FMO.

But let’s be honest here: do you really want to offer dozens of social security optimizations services for free? (I didn’t think so).

Do you really want to feed strangers a free meal at a fancy restaurant so you can entice them to hear your presentation?

Have you ever tried to sell an annuity to a prospect that responded to a radio or TV commercial promoting a “retirement” book or kit? (We all know it’s an uphill battle trying to sell annuities to prospects that only want the book or “info-kit” that was promised in the advertisement).

The gig is up and baby boomers are wisening up to these archaic (and misleading) marketing approaches.

Our prospects want more transparency when it comes to financial advice (which is why the old school marketing approaches are drying up, along with advisor’s businesses that don’t adapt to this new reality).

Here’s the harsh reality that few advisors are prepared for...



YOUR REAL COMPETITION IS INVISIBLE

Have you ever lost a case to a prospect that attended your dinner seminars or live workshop?

We see it happening all the time....

Financial advisors that are spending a small fortune on dinner seminars and events to drum up more business but after the first or second appointment the prospect ghosts them completely...Leaves without a trace. They're not returning calls or emails.

So what happened to them?

Obviously, they had a financial problem they needed solved or they wouldn't have scheduled the appointment in the first place.

Let me let you in on a little secret...

Your prospects are going online to research the annuities you just proposed to them, and lo and behold they landed on your competition's website and now they're doing business with your competition.

The more dinner seminars and events that advisors host, the MORE annuity business they end up driving into the hands of their competition (literally right under their nose).

Their competition is better equipped, better trained and has access to more advanced income planning strategies and proprietary annuities than the vast majority of advisors.

The ironic part is that this "new breed" of financial advisors do not actually live in your local market area.

They're "invisible" because they can be hundreds, if not thousands of miles away and they're closing new business — without ever having to meet with clients in person.

If this has ever happened to you, it's not your fault.

HERE'S THE BRUTAL TRUTH:

Consumers today are more resistant to traditional marketing methods; they are more sophisticated, and more Internet savvy than ever before.

Our target audience's tastes and preferences have dramatically changed due to COVID-19.

We've seen the dramatic consequences of this disruption in other industries within the last decade alone:

Brick and mortar retail businesses and restaurants are drying up due to the widespread adoption of Amazon and ordering food online.

Fancy hotels being displaced by local mom-and-pop Airbnbs.

Streaming media companies displacing traditional TV networks and radio programming. On-demand media.

Many Fortune 500 companies are shifting their entire businesses to enable employees to work remotely.

The list goes on and on and there will be many more to follow — as we're seeing in our industry.

What's happening right now can be summed up as follows: "In times of crisis, change is accelerated..."

Said in another way, times of crisis accelerates inevitable change. Changes were inevitably coming to our industry, it just took the COVID-19 pandemic to accelerate those changes.

Baby Boomers are now more accustomed to buying goods and services online and more comfortable using virtual communication tools like Facetime and Zoom.

Disruption is now shaking up our industry, and only those that adapt accordingly will survive and prosper in the years to come...

Most insurance carriers have finally taken notice and finally started to offer e-signature applications to enable apps to be signed virtually because many advisors were unable to meet with their clients in-person.

I don't mean to sound all "doom and gloom," but there are plenty of signals indicating that we're just in the early stages of the massive disruption entering our industry — and the advisors that don't see this tidal wave coming will be in for a rude awakening.

The good news is that this tidal wave of change offers an unprecedented opportunity for those that are forward-thinking and literally levels the playing field for all financial advisors.

THE TRUTH ABOUT DIGITAL MARKETING FOR FINANCIAL ADVISORS

As I mentioned previously, because of fierce competition and the lack of marketing innovation and support that most advisors get from their FMOs, advisors are now turning to expensive marketing agencies or marketing "gurus" for help.

Oftentimes many of these marketing agencies emphasize "automation" and "digital technology," but in reality, they struggle to produce actual leads or appointments (and in some cases require advisors to learn how to implement everything themselves).

Here's a tip:

Don't fall for the trap of getting sold on "vanity metrics" such as video views, comments, likes, Tweets, clicks, LinkedIn connections, or media citations — which don't actually translate into profitable client relationships.

Why is it that most of the marketing being sold to financial advisors produces little to no results?

Well, the answer is quite simple: it's because they're focusing on all the WRONG things...

Hint Your marketing should really only focus on three specific things (which I'll get to later).

After having generated hundreds of thousands of leads for financial advisors, I've discovered that most FMOs, marketing agencies, and consultants are actually clueless when it comes to producing ACTUAL RESULTS.

You see, many of these so-called digital marketing “experts” are selling advisors on:

Webinar Funnels (I have yet to meet one single advisor that’s crushing it with a webinar funnel, whether it’s live or automated).

Niche blogging (how many people are actually reading your blog?).

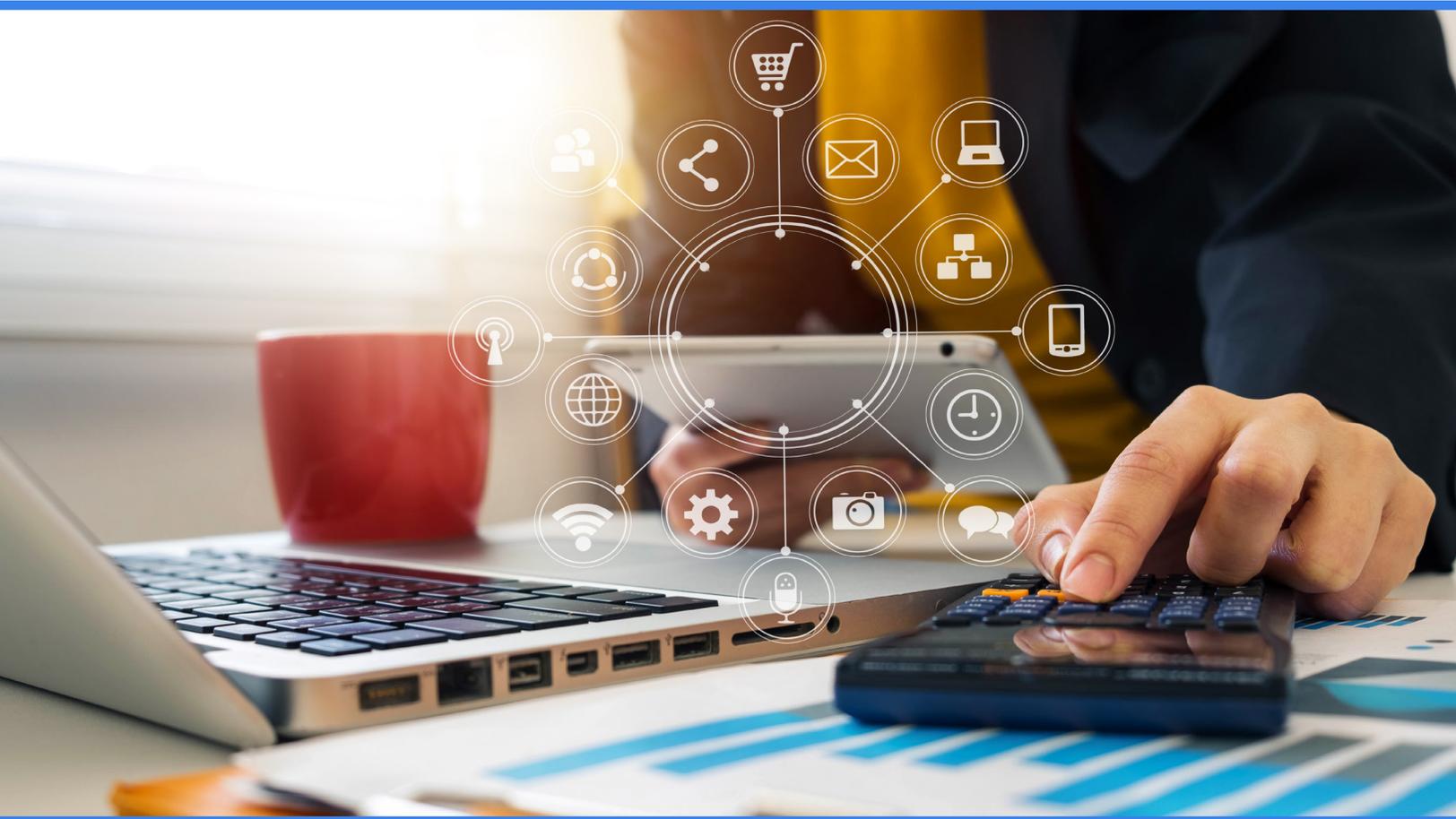
Posting videos on YouTube (getting a video to go viral is incredibly difficult).

Content marketing (aimlessly writing articles and hoping to get traffic is not a strategy).

Tweeting (I’ve never met an advisor that’s grown their business from Tweeting).

Making connections and LinkedIn social selling (how many connections or manual cold outreach emails do you need to write to actually land a client?).

Optimizing your website for SEO (how many clients have you gotten from SEO?).



Now granted, there are some exceptions to the rule. We’ve all heard of stories of financial advisors that spent a decade or more building a “unicorn” website that gets a ton of traffic and now they’re making more money from ads on their blog than they do from their financial practice.

But for the rest of us mere mortals, we need something that’s far more predictable and a process that can be replicated.

The alternative to hiring a digital marketing agency is to hire a self-proclaimed marketing guru to teach you how to implement digital marketing for yourself.

SIDEBAR

In full disclosure, my team and I were amongst the first to offer digital marketing training and live workshops to financial advisors. It was thrilling to see advisors building out their very first campaigns, launching online sales funnels and generating their first leads online...but as time progressed, many of the advisors began to struggle to produce consistent results given all the algorithm changes with Facebook and Google over the years.

We found the implementation part of digital marketing to be the biggest obstacle for most advisors, which was also partly due to the fact that they were so busy building their practice and didn't have time to actively monitor their online campaigns, nor did they have the inclination to do so.

To that end, we've transitioned our entire business model away from coaching and training to offering 100% done-for-you marketing programs. After years of trial-and-error and beta testing our current model, we've cracked the code on what we believe is a more innovative and efficient approach for advisors to plug into a done-for-you marketing system (which I'll address later on in this letter).

Today I'm committed to being a master practitioner of marketing and cringe when someone refers to me as a "marketing guru" because of all the negative baggage associated with "information marketers" today...

Chances are you've been getting bombarded with ads on Facebook and media feeds from marketers making big, bold, audacious claims.

THE RISE AND PROLIFERATION OF THE SELF-PROCLAIMED DIGITAL MARKETING 'GURU'

Unfortunately, many of these so-called marketing gurus grossly over-simplify just how easy it is to set up a digital marketing campaign from A-to-Z.

Sadly, many of the advisors that embark on implementing digital marketing in their practice fall short of producing any consistent results.

If you casually scroll through your Facebook news feed, you'll find no shortage of "marketing coaches, consultants or gurus" promising to help you scale your business to over \$1B in AUM.

There's literally a new Facebook advertiser hawking something to advisors pretty much every month.

The ads look something like this:

 **Financial Advisor Success Secrets**
Sponsored Like Page

Attention Financial Advisors that want to easily close more clients than ever before. I've helped advisors all around the country grow their practice to by showing them my simple 3-step formula.

I just released a brand new advisor case study that reveals...



How To Close More Clients Than Ever Before
Financial Advisor Case Study Reveals How To Close 3-4 New Clients Each Month
FINANCIALADVISORSECRETS.COM/CASE-STUDY Learn More

20 562 Comments 311 Shares

Like Comment Share

 **DIGITAL ADVISER MARKETING**
Sponsored Like Page

Financial advisors that are sick and tired of dinner seminars, pay close attention. I've been using a secret underground method to help advisors close 3-4 clients. These advisors are now scaling up their businesses and on their way to \$100MM in AUM.



It's Time To Ditch Dinner Seminars
Stop Wasting Money On Lousy Marketing
DIGITALADVISERMARKETING.COM/CASE-STUDY Learn More

20 562 Comments 311 Shares

Like Comment Share

These ads typically consist of a millennial or "former" financial advisor-now-turned marketing-guru posing in front of a fancy building, sitting in their office, or jet setting around on planes living the "good life" and promoting a "case study" or "training" video that promises to reveal the "little-known" secrets to generating leads, appointments, and closing clients using digital marketing.

So where did all these digital marketing gurus come from? — Well the answer to that question is quite simple:

A few years ago, we entered into what I refer to as the
"Advisor Gold Rush."

THERE'S GOLD IN THEM, THAR HILLS!

You see, back in the Gold Rush days, the ones making all the money were actually NOT the gold prospects. It was the opportunity-seekers that were selling shovels, axes and gold picks to "would-be" prospectors.

...And it's no different in our industry!



Massive profits are being reaped from hard-working financial advisors who want to jump on the "digital marketing bandwagon". Many of these marketing gurus came out of the woodwork after spending a couple of thousand bucks on a "digital marketing training program" designed to teach them how to sell marketing coaching programs.

These opportunistic Internet marketers discovered the financial industry to be far more lucrative than most other industries (yoga instructors, fitness trainers, hairstylists, etc.), because financial advisors tend to make a great living and are hungry to find new clients to work with.

As you've probably seen, these marketers post compelling Facebook ads that drive financial advisors to a carefully crafted online sales video that pitches them on booking a "strategy session" which is a glorified sales

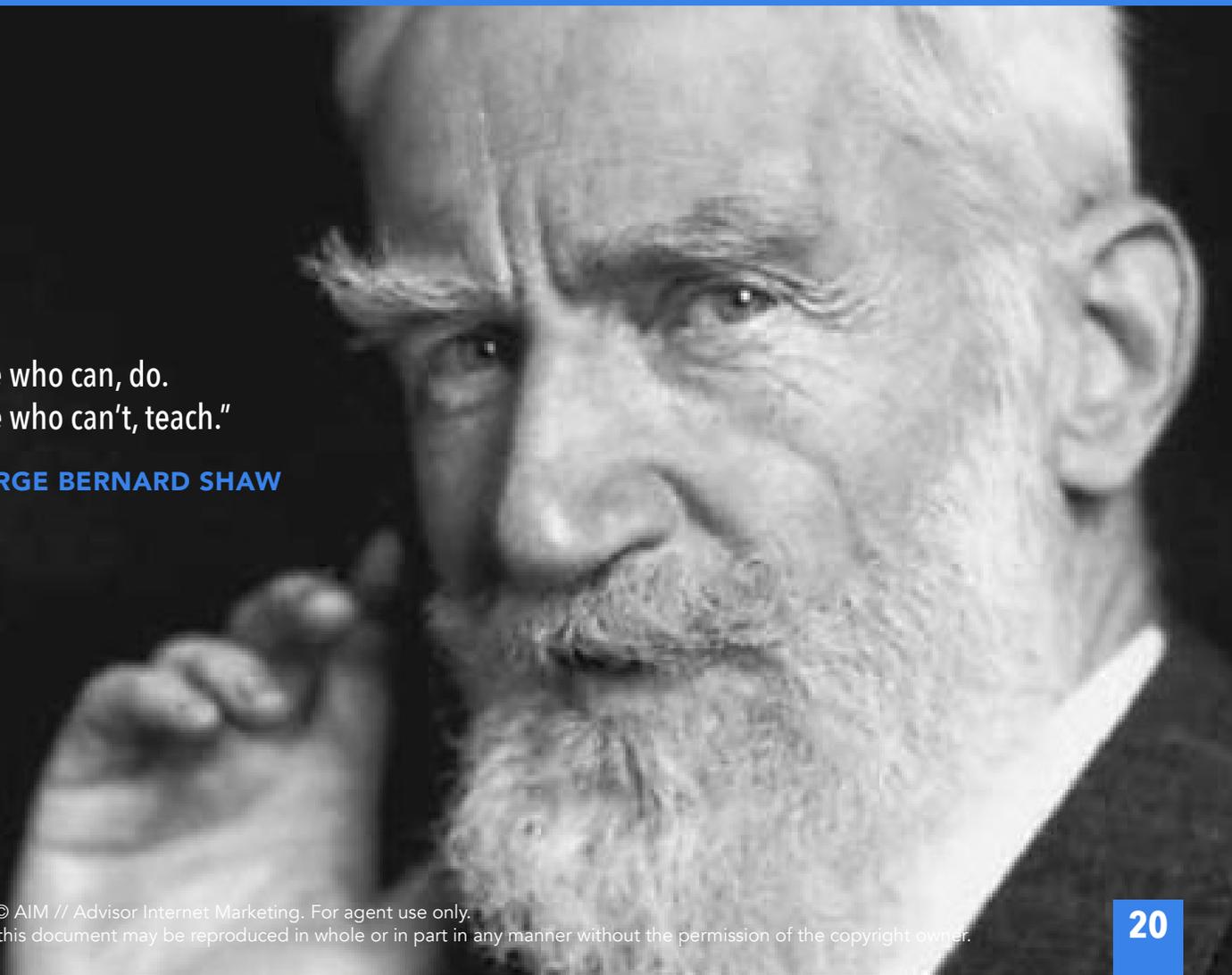
call to get pitched on a \$10,000 to \$20,000 "implementation coaching" or "accelerator program".

The basic premise behind these marketing coaching programs is to teach financial advisors digital marketing to drive traffic into their own online sales funnel and VOILÀ!

Your calendar will get booked solid with qualified prospects (well, that's at least what's supposed to happen).

If I may be so bold as to say that most advisors aren't all that interested in learning digital marketing for themselves, based on my personal experience, they just want it completely done for them.

Well, the question remains: Why are these so-called marketing 'gurus' pushing advisors to learn how to implement digital marketing themselves?

A black and white close-up portrait of George Bernard Shaw. He has a full, white beard and mustache, and is looking slightly to the left of the camera with a thoughtful expression. His right hand is partially visible near his chin.

"Those who can, do.
Those who can't, teach."

- **GEORGE BERNARD SHAW**

Because it's easier to TEACH financial advisors digital marketing than it is to actually do it for them!

Harsh words, yes I know...

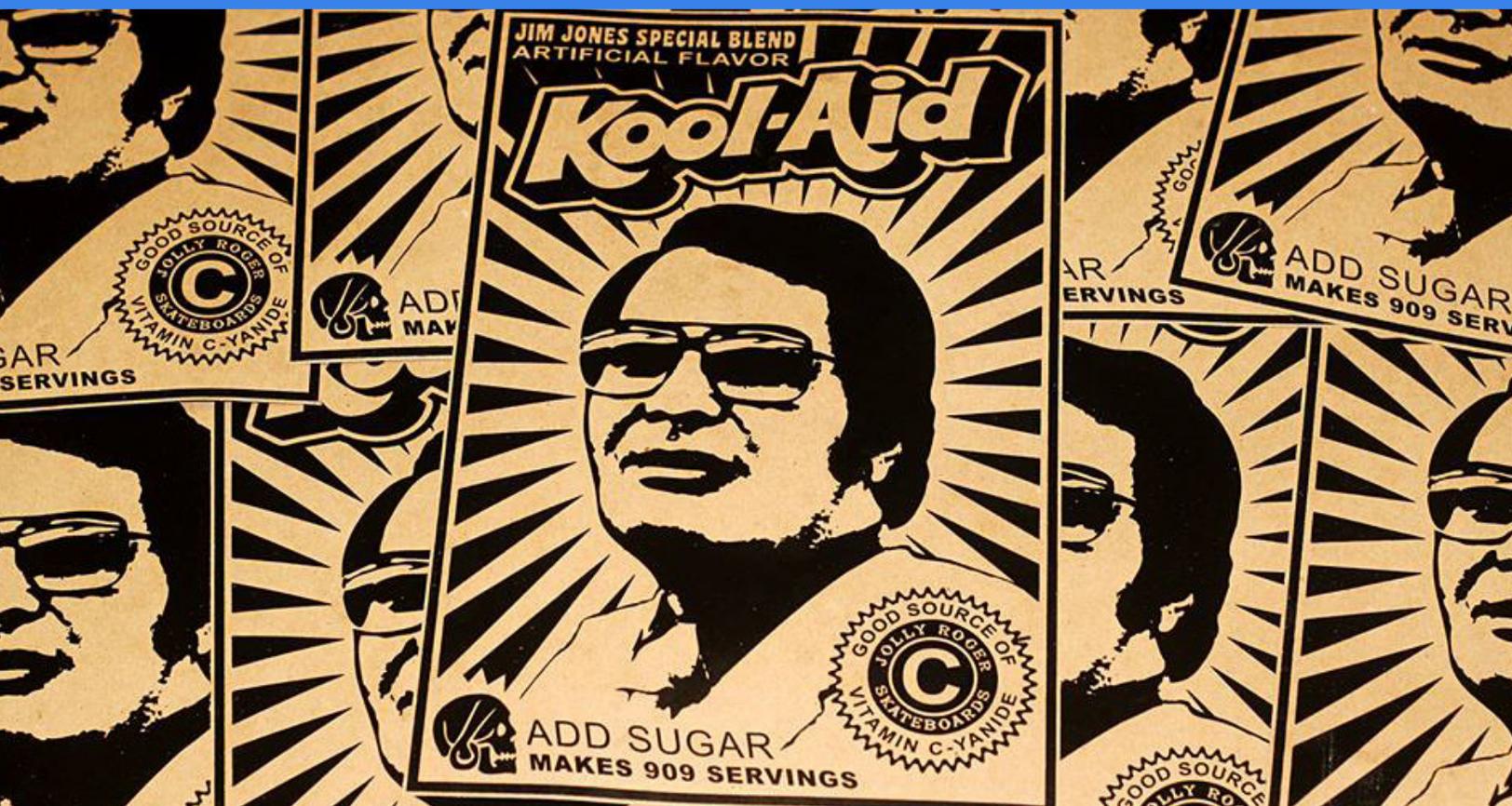
Furthermore, it's far easier to build and scale a multi-million dollar group coaching business selling to financial advisors than to actually deliver done-for-you marketing that produces tangible results (I know this first-hand, based on my own personal experience).

You see, it takes the same amount of time and energy to coach 5 financial advisors as it does 50, which is why it's such a lucrative business model for savvy marketers.

Some marketing coaches may be led to think that they are exceptional marketing coaches because they're making \$100K+ per month coaching clients...

Here's the self-delusion trap that I've seen marketing coaches fall into:

If a marketing coach is making \$100K per month, they tend to "drink their own kool-aid" and believe that their advisor coaching clients are getting tons of real value.



Sadly, that couldn't be further from the truth with many of the marketing "gurus" in our industry.

It's one thing to market and sell coaching services to advisors (which is quite easy to do), it's another thing to help advisors ACTUALLY generate millions of dollars in new business predictably.

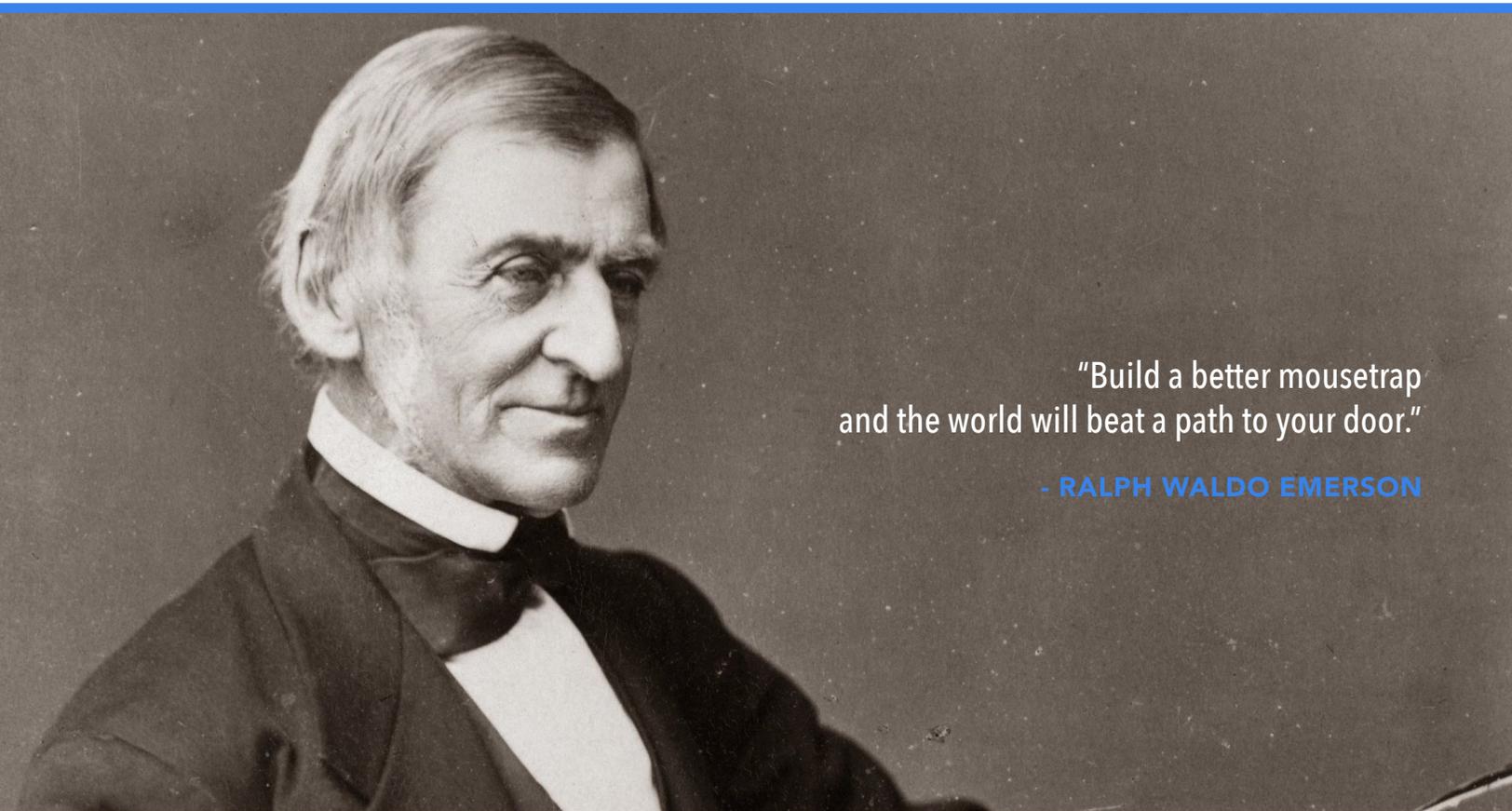
Look, I'll be the first to admit, there are some exceptions to the rule — but most advisors struggle with implementation because they're so busy running their practice and running marketing campaigns is a full-time job...Not something that you can casually monitor once a week!

The best way to empirically measure a "marketing guru's" real value is by the actual new business (and ROI) that they're helping advisors bring in each day, NOT by how much money they're making themselves by selling their marketing coaching services to advisors.

Here's a fact...the real players that are actually making it rain, are NOT teaching this stuff.

They're too busy building massive companies! (think Fisher Investments, WealthFront, Betterment, Acorns, Robin Hood, Coinbase, etc.).

After spending tens of thousands of dollars on digital marketing coaching and many more thousands on Facebook ads, most advisors are disheartened to discover how difficult it really is to produce results consistently. Financial advisors should be spending most of their time growing their business by meeting with qualified prospects and serving clients, NOT tinkering with websites, tweaking ads or monitoring marketing analytics.



"Build a better mousetrap
and the world will beat a path to your door."

- RALPH WALDO EMERSON

Basically, financial advisors are trading one "mouse-trap" for another in a futile attempt to drive more business. The latest marketing "mousetrap" being pushed by our industry is using Facebook ads to drive attendees into dinner seminars.

Remember the ol' Ford Pinto that exploded upon rear-impact?

Using digital marketing to drive prospects into dinner seminars is like bolting a supercharger on a Ford Pinto...

Sure you may go a bit faster, but you're still driving an old Pinto and the vehicle is still seriously flawed. Instead of "pimping" out the Ford Pinto...why don't we scrap the vehicle altogether and rebuild everything from the ground up???



LET'S SCRAP THE OLD MARKETING MODEL FOR SOMETHING NEW

It's time for a new marketing model to emerge in our industry (something comparable to the Formula 1 vehicles that zip around the track at 200 MPH)...



I'm referring to a modern, more efficient approach to consistently attract more qualified prospects — that requires the least amount of time and effort on the part of the advisor.

And it has NOTHING to do with:

Hosting more dinner seminars, webinars, or extremely time-consuming live events...

It also doesn't require financial advisors to waste their time learning how to implement Facebook campaigns, automated sales funnels, or build LinkedIn Groups...

Building online sales funnels in ClickFunnels, Infusionsoft, blogging, or building websites...

The advisors that have discovered this "secret" are too busy running appointments with qualified prospects — that are provided to them predictably and consistently (all on auto-pilot).

[Keep reading to learn more...](#)

After addressing all the challenges we see advisors facing and how they're trying to address them, we think it's important to take a step back and ask ourselves...

WHAT DO FINANCIAL ADVISORS WANT?

If you were really honest answering that question, it would probably NOT involve any of the following:

Hosting more dinner seminars at fancy restaurants, or teaching retirement classes or workshops at local libraries or universities.

Having a fancy office with a large staff.

Authoring a "best selling" book.

Garnering media citations.

Getting interviews on a financial news show.

Having a flashy website.

Gaining tons of LinkedIn connections, a large Twitter following, adding Facebook friends or having to host weekly webinars.

Based on my experience working with advisors over the past decade, what most financial advisors REALLY want is pretty simple...

THEY WANT TO SPEND MORE TIME IN FRONT OF QUALIFIED PROSPECTS.

WHAT DO YOU REALLY WANT?

If you're like most advisors, you want confidence knowing that there's a steady pipeline of prospective clients wanting to work with you.

You want to be able to build your practice while enjoying time with your family.

You're looking for proven ways to attract more qualified clients, with the least amount of TIME, MONEY and EFFORT!

Here's the bottom line, most advisors just want to...

WORK LESS, AND MAKE MORE.

Let me say it one more time... Most advisors just want to work fewer hours and make more money (while still serving clients well). Clearly, that's easier said than done — especially with all the conflicting ideas being pushed out there.

FMOs and marketing agencies have made far too many bold promises to advisors, with little results to back it up.

IN AN INDUSTRY FRAUGHT WITH BOLD CLAIMS AND PROMISES, MARKETING GIMMICKS AND FAKERY, MOST ADVISORS ARE LEFT FEELING AS AN AFTERTHOUGHT.

And while the FMO industry swarms around "top producers" like bees to honey, the rest of the advisors end up getting treated like second-class citizens and end up turning to second rate marketing agencies and digital marketing "gurus" for help —with next-to-nothing to show for it.

I think the status quo is broken, so I decided to do something about it (more on that later). It's time to re-define the rules for building a successful and thriving financial practice.

A NEW BREED OF FINANCIAL ADVISORS IS EMERGING...

While most "old school" advisors are jockeying to bring in new business in their local market area, as we mentioned before, there's a new breed of financial advisors quietly bringing in millions of dollars in new business by doing the EXACT opposite of what everyone else is doing — and having a whole heap of fun at the same time!

This "modern" group of financial advisors are challenging the status quo by reinventing the rules of success in our industry.

By and large, these advisors are happy building a wildly profitable advisory practice “under the radar” without all the fanfare or trying to make it on the “leaderboard”.

YOU WON'T SEE THEM DOING ANY OF THE FOLLOWING:

- Speaking on stage at your FMO's sales conference.
- Lining up interviews with financial pundits on TV.
- Sharing their secrets at your FMO's incentive trips or recruiting events.
- Wasting their time trying to learn how to implement digital marketing or hosting endless webinars or trying to build out “evergreen” webinar funnels.
- Hosting expensive dinner seminars or running around meeting clients for in-home visits (or in the office, for that matter).

WE THINK THERE IS A BETTER WAY TO BUILD A WILDLY PROFITABLE ADVISORY PRACTICE.

Here at AIM, we're leading the charge by helping financial advisors grow their practice by plugging into our 100% done-for-you digital marketing programs.

We specialize in delivering targeted annuity leads delivered in real-time to our financial advisors' email inbox and automatically schedule appointments right on their calendar.

We deliver leads and appointments without advisors having to lift a finger — all on autopilot.

- No more needing to meet clients in your office.
- No more needing to drive to meet your prospects in their home.
- No more feeding people at dinner seminars or hosting client appreciation events.
- Everything can be done 100% virtually *without* the need for a fancy office, an expensive website, large staff, or overhead.
- A proven annuity sales process that easily and ethically converts prospects into clients and you keep 100% of the street-level commission on annuity cases closed.
- Exclusive access to tools and technology and advanced income planning strategies and proprietary annuity products that less than 1% of advisors even know exist.

No more “hopeful marketing” that we hope and pray turns into results. Everything we do is measured and tracked to produce a positive ROI.

WE'RE REDEFINING THE RULES OF SUCCESS FOR THE MODERN, FINANCIAL ADVISOR.

Advisors can build a location-independent practice that's not tied to a brick-and-mortar location.

We help financial advisors work WHENEVER and WHEREVER they want.

Clearly, there are advisors bringing in large sums of new business using the "old model", but many of them are grinding out dinner seminars or hosting live events several times per week and are having to chase prospects around town in order to make it all happen.

But that's not what YOU want.

My guess is that you want to build a highly profitable practice, while still having the freedom and flexibility to live a lifestyle that few advisors know is even possible — otherwise you wouldn't be reading this report.

IMAGINE WHAT YOUR DREAM BUSINESS AND IDEAL LIFESTYLE WOULD LOOK LIKE

What's possible for you, if you had the income and freedom that you desire?

Would you spend more time with your family and friends?

Would you travel more and not feel chained to your office?

How about spending more leisure time enjoying hobbies, sports & activities?

Would you be more active and live a healthier, stress-free lifestyle?



You would be living life to its fullest!

Want to work from home today in your shorts? No problem!

How about running a client review meeting from your lake house or while fishing on your boat? Enjoy the view.

Want to travel with your family, while continuing to build your practice?
Bon Voyage!

In this "new reality" you're no longer bound to the geographic limitations
of having to work from your office or needing to "impress" your clients
with a fancy lobby and welcoming staff.

THE COVID-19 PANDEMIC HAS BROKEN DOWN THE TRADITIONAL WALLS OF OUR INDUSTRY, AND IT WILL NEVER BE THE SAME.



And that's where AIM comes in — by offering scalable, digital marketing programs that help advisors predictably close new clients every month.

We do this by using smart and automated marketing that completely by-passes traditional methods, thereby eliminating the need of having a fancy office, large staff, dinner seminars, or in-person meetings with prospects.

Our process enables advisors to meet with clients with just an Internet connection and a cellphone.

This is the exact same system that advisors are using to sell MILLIONS of dollars in annuity premium and provides them the freedom and ideal lifestyle that they desire.

Would you like to bring in an additional multiple six-figures of profit per year or reduce the number of dinner seminars you host each month?

WE'LL HELP YOU GET THERE, WITH THE MOST AMOUNT OF FREEDOM AND EASE

Of course, we're still huge proponents of working hard, but we're challenging the status quo and redefining the rules of the game — so advisors can build a successful business that supports their ideal lifestyle (and NOT the traditional definition of success that's being touted by "top producers" of old).

We help financial advisors predictably attract their ideal clients, without hosting a single dinner seminar or having to lift a finger to implement complicated digital marketing campaigns or funnels.

Yes, I know it sounds a bit far fetched, but it's backed by solid data after many years of field-testing.

Our team has over a decade of experience generating annuity leads online and has launched marketing campaigns that have produced hundreds of thousands of annuity leads.

We eat, live, and breathe this stuff so you can focus on what you're really good at:



BUILDING PROFITABLE RELATIONSHIPS WITH PROSPECTS AND SERVING MORE IDEAL CLIENTS

While most advisors are grinding out dinner seminars, workshops, building webinar funnels or chasing clients around town — our financial advisors are doing the exact opposite and making more **INCOME** and **PROFITS** while experiencing more **FREEDOM** than they ever dreamed was possible.

HERE'S HOW IT WORKS

Remember how I mentioned earlier that you need to focus on 3 things in order to make digital marketing work for your practice? Well, here they are in their respective order..

Our done-for-you marketing programs utilize a proven formula to predictably generate leads online by fiercely focusing on 3 specific things:

01

DRIVING TRAFFIC

(attracting targeted and qualified prospects)

We use a combination of traffic strategies that target prospects ranging from people approaching retirement to folks that want to buy an annuity.

02

GENERATING LEADS

(predictably and consistently)

We educate retirees and annuity prospects with online video presentations, retirement quizzes, and intelligent sales funnels to address their biggest retirement challenges.

03

SETTING APPOINTMENT

(on auto-pilot)

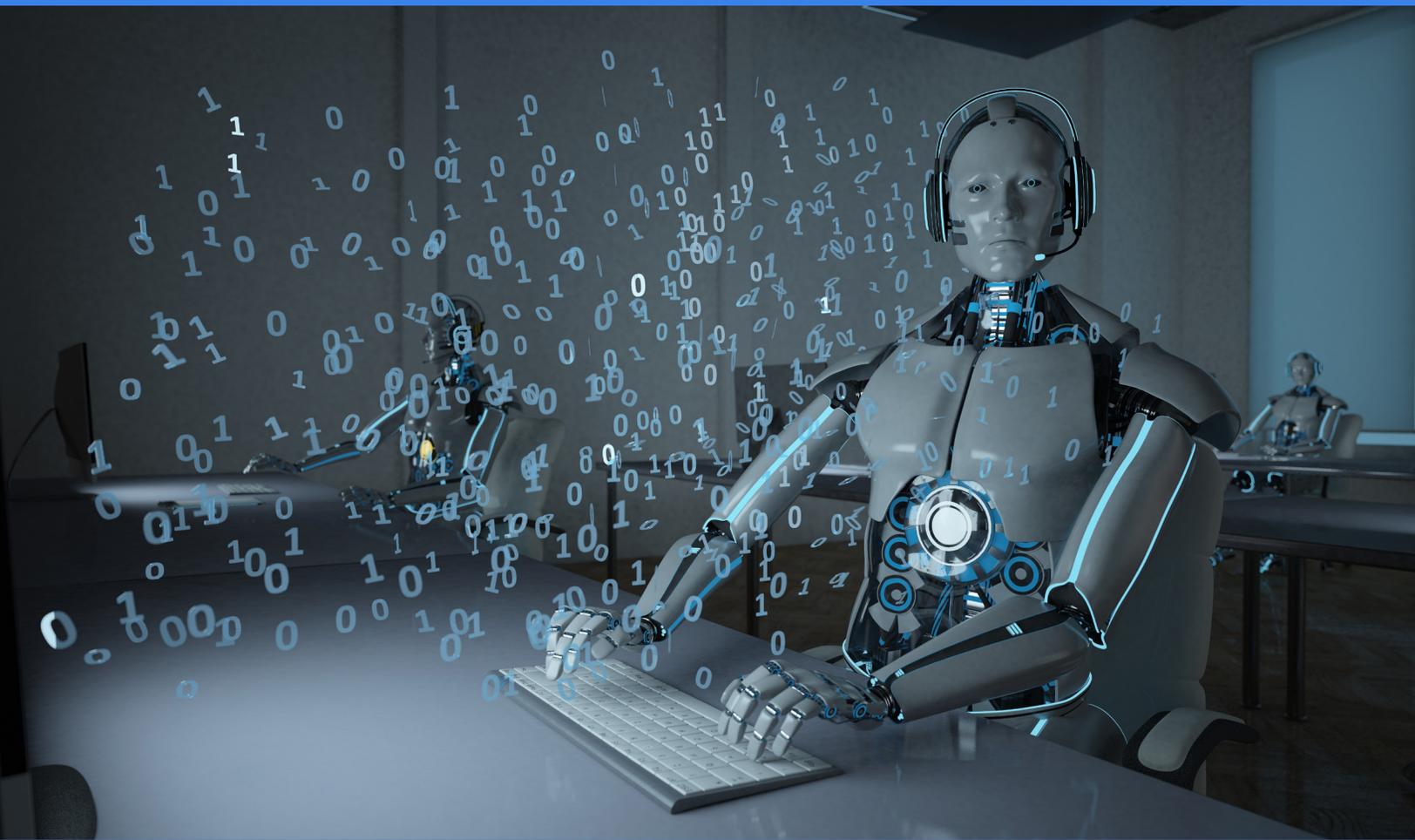
We use automated email sequences to inform, educate and inspire prospects to request an appointment with you in conjunction with highly trained appointment setters that call your leads on your behalf.

Our campaigns are working 24/7, 365 days per year like “sales robots” that deliver educational presentations to prospects and ultimately produce leads and appointments for our advisors while they sleep.

This is no exaggeration, our advisors literally wake up to leads in their inbox and appointments on their calendar, without lifting a finger — pretty cool, right?

[CLICK HERE TO LEARN MORE ABOUT OUR DONE-FOR-YOU ANNUITY LEAD GENERATION PROGRAM](#)

OUR ARMY OF "SALES ROBOTS" WORK AROUND THE CLOCK FOR OUR ADVISORS



We unleash what we call an army of "sales robots" that deliver sales presentations that educate and ethically persuade prospects to work with our advisors.

Imagine having your own private army of "sales robots" delivering sales presentations to your prospects 24 hours per day, 7 days per week — all on autopilot.

Your ability to deliver sales presentations to prospects (à la dinner seminars) is limited by the number of events you host and the number of hours you can work — which clearly gives our advisors an unfair advantage.

We all know that when it comes to spending your time, once it's spent, you NEVER get it back and it's gone forever!

This is why when you are evaluating your marketing ROI, you want to be sure to factor in the total time investment that is required.

And based on conservative estimates, a dinner seminar marketing campaign takes up a total of 18 hours and can only be delivered through 100% manual work.

So the question to ask yourself is: "Are you placing enough value on your time?"

SO HERE'S HOW TO LEARN MORE

Since you've made it this far I'm going to assume that I've piqued your interest.

Here's what to do next:

Join me on a special webinar where I'll walk you through how to predictably close more annuity business with our done-for-you digital marketing.

Here's what I'll reveal on this webinar:

- The types of prospects we target and how we consistently generate highly targeted traffic, leads, and appointments.
- How we use "psychic sales sequences" to indoctrinate and predict EXACTLY what our prospects want (and give it to them).
- The proven technology tools and methods we use to convert leads into warm appointments on autopilot.
- How to use our system to consistently close annuity business with targeted leads — without ever having to worry about any technology setup or complicated implementation.

Oh and by the way, if you've already registered for my upcoming webinar, thanks for signing up — you should have already received via email the Zoom webinar login details.

So if you're looking for a modern and hassle-free approach to effortlessly attracting more qualified prospects, so you can build your dream business...

Then join me on an [upcoming webinar](#) where I'll walk you through step-by-step our entire digital marketing program.

[CLICK HERE TO REGISTER FOR OUR WEBINAR TO LEARN MORE ABOUT OUR DONE-FOR-YOU DIGITAL MARKETING PROGRAM](#)

Sincerely,



Jovan Will
Co-founder, AIM

P.S. Now you know the 3 specific things we focus on in order to predictably generate leads and appointments for our advisors.

If you're looking to hire ANY digital marketing provider or FMO, here are the 3 key questions that you must ask BEFORE you hire or work with them...

By asking these 3 specific questions, you'll immediately discover whether they know what they're talking about — or if they're just trying to sell you on worthless "vanity metrics"!

Here are the 3 key questions:

Question No. 1: How are you driving traffic?

Question No. 2: How are you generating leads?

Question No. 3: How are you going to help me book appointments on my calendar?

P.P.S. Geez, this is a long report, right? lol

If the marketing provider cannot easily answer these 3 key questions and have verifiable proof that their marketing is helping financial advisors generate new business predictably — then you may be sorely disappointed.

And lastly, ask them if everything is fully automated and done-for-you. If the answer is NO, you'll be forced to manually send out tons of "cold emails" and make endless outbound phone calls in order to chase down prospects (and that's clearly not the best use of your time!).

I hope you found this report useful. Whether you end up working with us or any other digital marketing services provider you now are armed with "insider" information to help you make informed decisions regarding the best ways to invest your advertising dollars in the Digital Age.

Cheers!

- Jovan

[CLICK HERE TO REGISTER FOR OUR WEBINAR TO LEARN MORE ABOUT OUR DONE-FOR-YOU DIGITAL MARKETING PROGRAM](#)

Have any questions or comments?
Call my office today (888) 979-2701 or shoot me a text at (480) 405-0457.

FREE BONUS RESOURCES TO HELP ADVISORS SUCCEED IN THE POST-PANDEMIC WORLD

WATCH OUR TOP WEBINAR PRESENTATIONS:

[Industry Public Service Announcement: What Every Advisor Should Know Before Hiring A Marketing Service Provider.](#) A lot has changed in the marketing landscape in our industry due to the pandemic. This webinar will reveal the top 7 questions you need to know before you hire any digital marketing provider or FMO (or choose to implement digital marketing yourself).

[How To Predictably Close Annuity Business Virtually, Without Ever Having To Meet With Clients In-Person.](#) This webinar will reveal the annuity sales process we use to predictably close business — without ever having to meet in person. This simple 3-step process can be used to ethically and effortlessly convert prospects into clients while delivering massive value.

LISTEN TO OUR MOST POPULAR PODCAST EPISODES:

[Virtual Sales Secrets: How To Close Large Annuity Cases Over The Phone And Build A Highly Profitable Practice.](#) (Originally released on Jan. 19th, 2018). In this episode, we break down how to effortlessly close large annuity cases 100% over the phone and how adapting a virtual sales process has been a gamechanger for advisors.

[Digital Marketing Secrets: Confessions Of A Marketing Guru, Real World Lessons Learned In Field Over The Last Decade.](#) (1,312 Downloads). In this episode, I address the warnings you should heed before you hire any marketing consultant or “guru.” See how to quickly verify if a marketing service provider is the real deal.

[5 Inconvenient Truths About Our Industry And How You Can Prosper In The Digital Age.](#) (1,445 Downloads) In this 2-part episode, I break down current trends happening in our industry and how financial advisors can gain an unfair advantage over their competition.

[CLICK HERE TO REGISTER FOR OUR WEBINAR TO LEARN MORE ABOUT OUR DONE-FOR-YOU DIGITAL MARKETING PROGRAM](#)

Have any questions or comments?
Call my office today (888) 979-2701 or shoot me a text at (480) 405-0457.