

AIM



# HOW TO ATTRACT ENDLESS ANNUITY PROSPECTS AND CLIENTS AUTOMATICALLY

*THE SECRET TO GROWING YOUR PRACTICE IN THE DIGITAL AGE*

*BY JOVAN WILL*

*REVISED AND UPDATED FOR 2024*

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

# PREFACE

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

Traditional marketing methods like dinner seminars, retirement workshops, and educational classes are far more costly and ineffective than ever before - which is why many advisors are seeking alternative approaches to grow their practice.

We're also seeing that market volatility and rising inflation have presented some serious challenges to those who are retired or approaching retirement.

Here's what my mentor Robert Kiyosaki taught me: the greatest opportunity in history to build businesses and serve people well, are during times of crisis.

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

For over the last 5 years, we have helped advisors all over the country grow their practice with just an Internet connection and a cellphone. The following report clarifies precisely how we leverage digital marketing to generate leads and qualified appointments for virtual advisors.

My hope is that this report will give you an “insider” look into transitioning 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 ever-changing 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

P.S. In case you're one of those people (like me) who just skips to the end, click the link below to see a few of our most recent advisor success stories...

**[CLICK HERE TO SEE A FEW OF OUR MOST RECENT ADVISOR SUCCESS STORIES...](#)**

# 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 truth and transparency 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 know before you work with any FMO or digital marketing company.

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 may be 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?

Your long-time 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 a pretty logo that produces ZERO leads). You value the relationship you have with your existing FMO, but you realize they lack digital marketing expertise.

The advice or coaching you're getting from a "mega" or top producer at your FMO works well for them but is virtually impossible to duplicate in your market area.

You're promised to have your calendar flooded with FREE qualified annuity appointments in a protected territory — only to find out that you need to be a "captive" agent and give up over 50% of the commission and are required to drive all over town to meet with prospects (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 advertising (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).

You're getting dwindling responses 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'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 clicked on a digital marketing "guru's" Facebook ad that sold you on the idea of setting up your own Facebook ads, launching LinkedIn campaigns, or building marketing funnels, 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 annuity 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 another advisor that your client found through the Internet (even after you've put in 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, which basically means...

# 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 marketing 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, hosting a radio show, or getting “featured” on a financial news show.



## 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” remnant leads, only after all the “highest quality” leads have been “cherry-picked” by employed “in-house” 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). You may also need to “kiss a lot of frogs” if these prospects responded to advertising in order to set up a trust, or receive estate or tax planning advice (and were not actually interested in annuities in the first place.)

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).



They tend to steer financial advisors into spending more of their hard-earned money, regardless of whether the advisors are producing a healthy ROI.

## 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? How are you feasibly able to scale a referral program?

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.

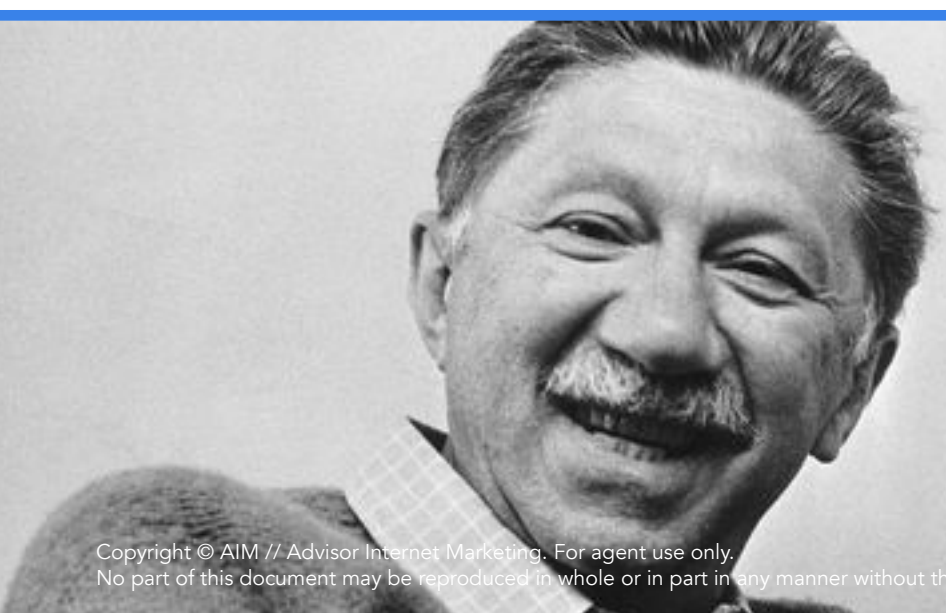
**"DO MORE DINNER SEMINARS AND LIVE EVENTS!" is pretty much the only advice they give to financial advisors that can't get in front of enough qualified prospects.**

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" being paraded on stage at their recruiting events.



"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 over 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 or tax 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 FMOs 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 optimization 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? (I doubt it).

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 truth and transparency when it comes to financial advice (which is why the old-school marketing approaches are drying up, along with advisors’ 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 to solve 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 noses).

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 does not actually live in your local market area.**

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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 with on-demand media.
- Doctors, nurses, and medical professionals now offer "telemedicine" virtual appointments to their patients.

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 accelerate 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 to get the help they need.

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

Most, if not all, 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 during the lockdowns.

**I don't mean to sound all "doom and gloom," but there are plenty of signals indicating that our industry is ripe for disruption — 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 independent financial advisors and annuity producers.

## **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 buzzwords like A.I., automation, or social media, but in reality, they still struggle to produce predictable annuity 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 grossly oversimplify what it actually takes to produce PREDICTABLE and CONSISTENT results.**

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

- Artificial Intelligence (AI)** (We do use AI in our marketing campaigns, but the technology is still rapidly evolving and hasn't quite yet replaced us humans.)
- 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).
- Posting articles and links on Facebook** (Typically produces ZERO leads.)
- 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, sorry Elon! lol.).
- 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 got 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.

Which is why years ago, in 2015, we transitioned our entire business away from digital marketing 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 platform (which I'll address later on in this report).

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 news 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** Like Page  
Sponsored

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](https://FINANCIALADVISORSECRETS.COM/CASE-STUDY) Learn More

20 562 Comments 311 Shares

Like Comment Share

 **DIGITAL ADVISER MARKETING** Like Page  
Sponsored

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](https://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 and grifters came out of the woodwork after spending a couple thousand bucks on a "digital marketing training program" designed to teach them how to sell marketing coaching programs.

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

**Some (former) "advisors-turned-marketers" also realized that it's much easier to sell marketing programs to fellow advisors than it is to actually market their own practice... oh the irony!**

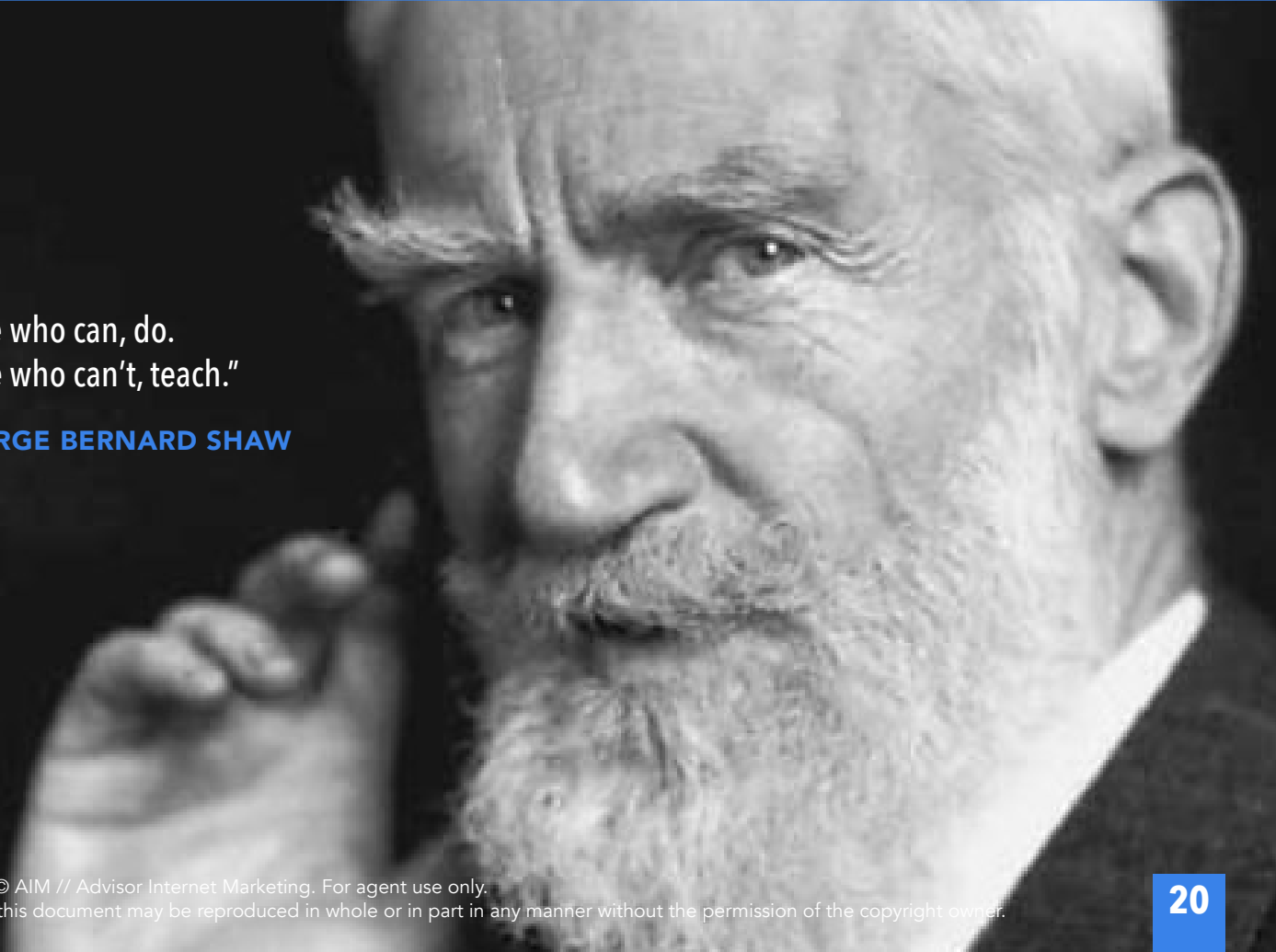
As you've probably seen, these marketers post

"click-bait" Facebook ads that direct you to watch a carefully crafted "video sales letter" (VSL) that pitches them on booking a "strategy session" which is a glorified sales call to pitch you on a \$10,000 to \$20,000 "implementation coaching" or "accelerator program".

The basic premise behind these "done-with-you" 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 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?



"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...

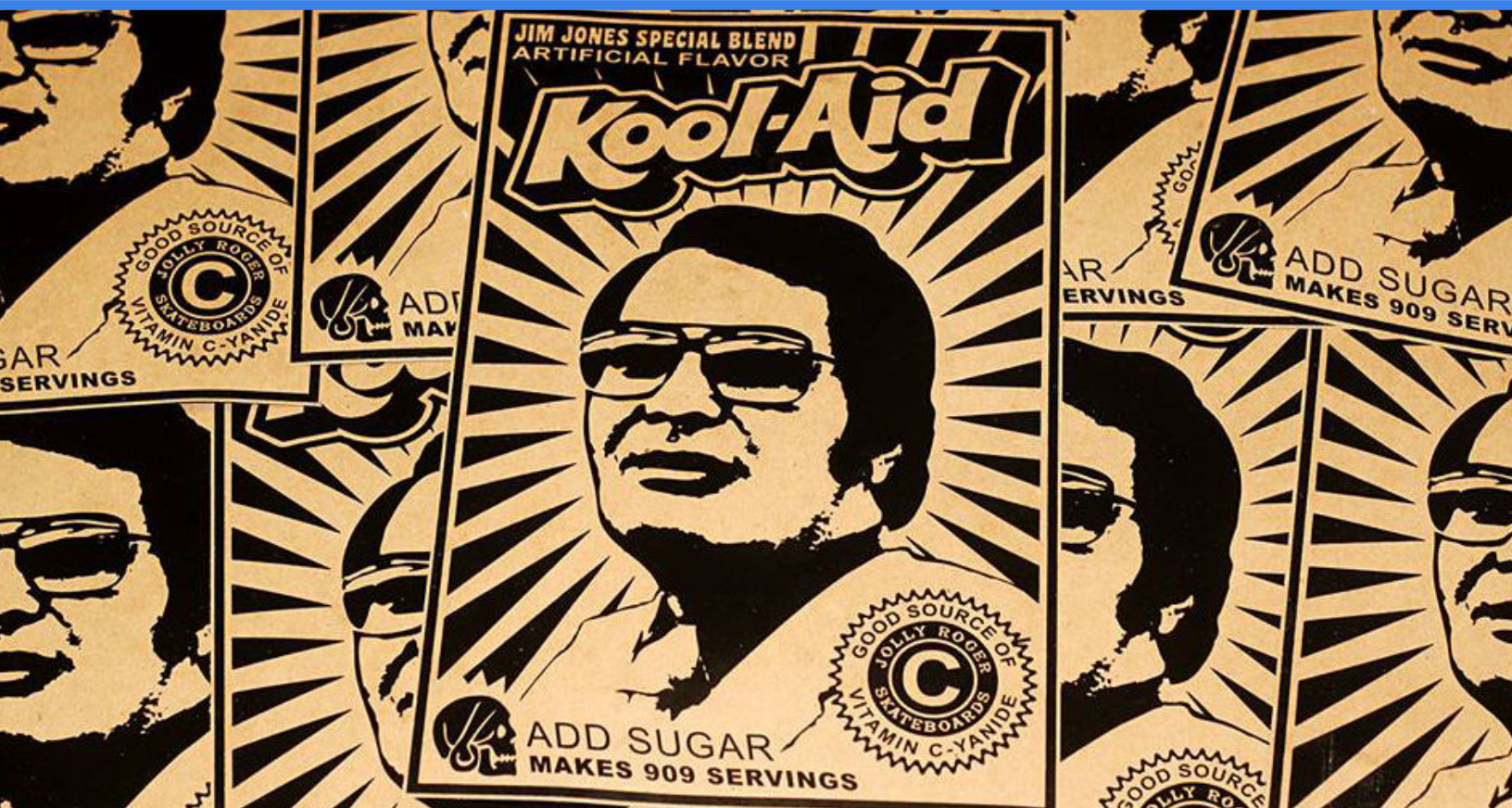
**Furthermore, it's far easier to build and scale a multi-million dollar group coaching business selling to financial advisors than to actually deliver done-for-you marketing that produces tangible results (I know this first-hand, based on my own personal experience).**

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 because managing marketing campaigns is a full-time job... Not something that you can casually monitor once a week!**

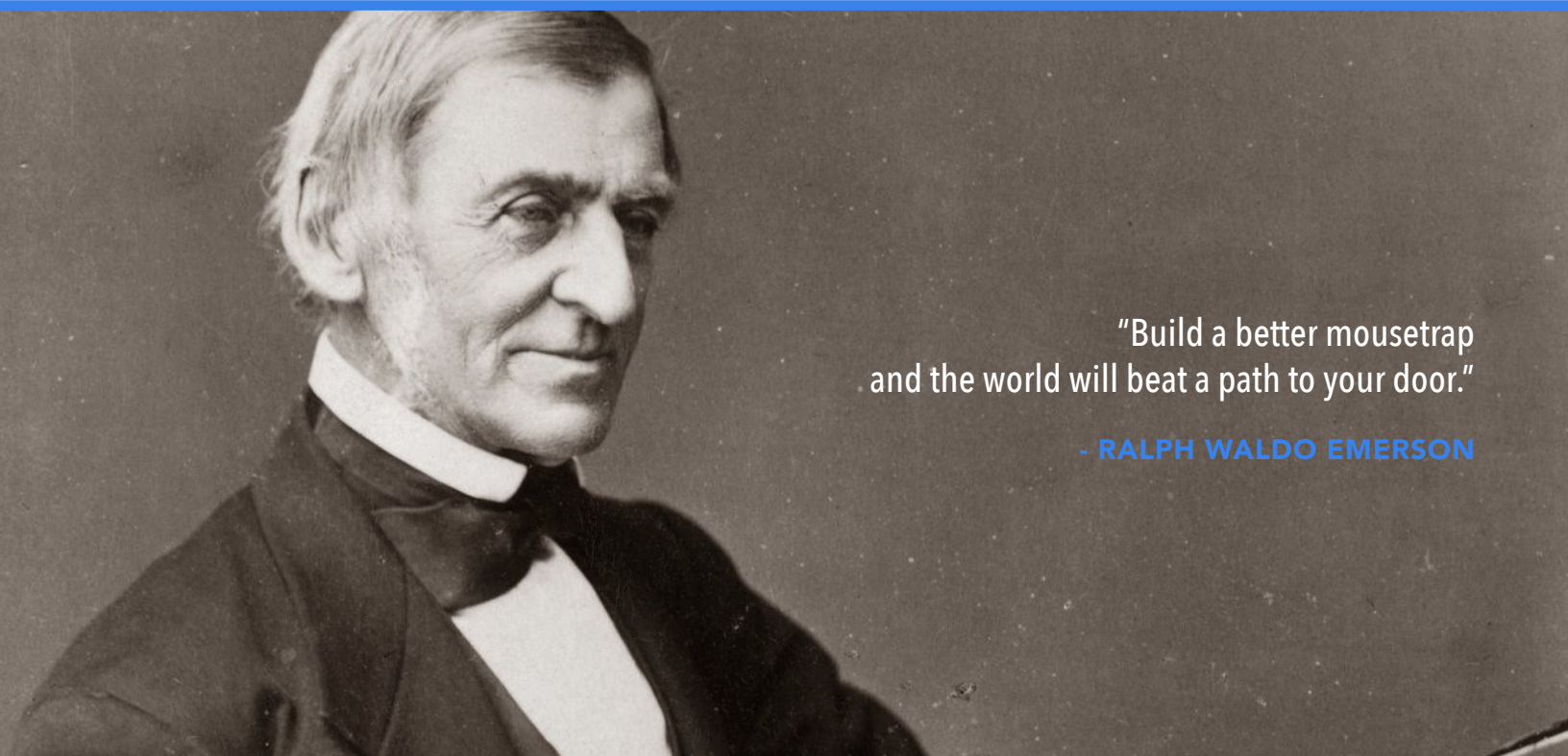
The best way to empirically measure a "marketing guru's" real value is by the actual new business (and ROI) that they're helping advisors bring in day in and day out, NOT by how much money they're making themselves by selling their marketing coaching services to advisors.

[Click here to see real-world case studies of advisors that we have helped.](#)

**Here's a fact... the real players that are actually making it rain, are NOT teaching this stuff or "installing" their marketing system into other advisors' businesses...**

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 "mouse trap" being pushed by our industry is using Facebook ads to drive attendees into dinner seminars, live events, or educational classes.



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

Using digital marketing to drive prospects into live events or 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, and direct 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 (Keap), blogging or building out websites, or using LinkedIn.

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).

[Click here to see real-world case studies of advisors that we have helped...](#)

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 in 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 financial news or radio shows.

Having a flashy website.

Gaining tons of LinkedIn connections, conducting resume reviews, growing 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.



# SO 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 in a different way... 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 them up.**

**IN AN INDUSTRY FRAUGHT WITH BOLD CLAIMS AND PROMISES, MARKETING GIMMICKS, AND FAKERY, MOST ADVISORS HAVE BECOME HIGHLY SUSPECT AND SKEPTICAL (AND RIGHTLY SO)**

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 turn to second-rate marketing agencies and digital marketing "gurus" for help —with next-to-nothing to show for it.

**The status quo is broken, so I decided to do something about it (more on that later). It's time to redefine 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 is challenging the status quo by reinventing the rules of success in our industry \(click here to see actual case studies\).](#)**

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 “best seller” list.

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

- Speaking on stage at your FMO's sales conference.
- Lining up interviews with financial talking heads on TV or radio.
- Sharing their secrets at *your* FMO's incentive trips or recruiting events.
- Wasting their time trying to learn how to implement digital marketing, 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 platform.

We specialize in delivering targeted annuity leads delivered in real-time to our financial advisors' email inboxes 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 is conducted 100% virtually without the need of a fancy office, an expensive website, large staff, or overhead.
- Advisors use a proven annuity sales process that easily and ethically converts prospects into clients and they keep 100% of the street-level commission on annuity cases closed.
- Get exclusive access to tools and technology, 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 "old-school methods", 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, and 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 a vacation 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 paradigm”, 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 a smart and automated marketing platform that completely bypasses 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.**

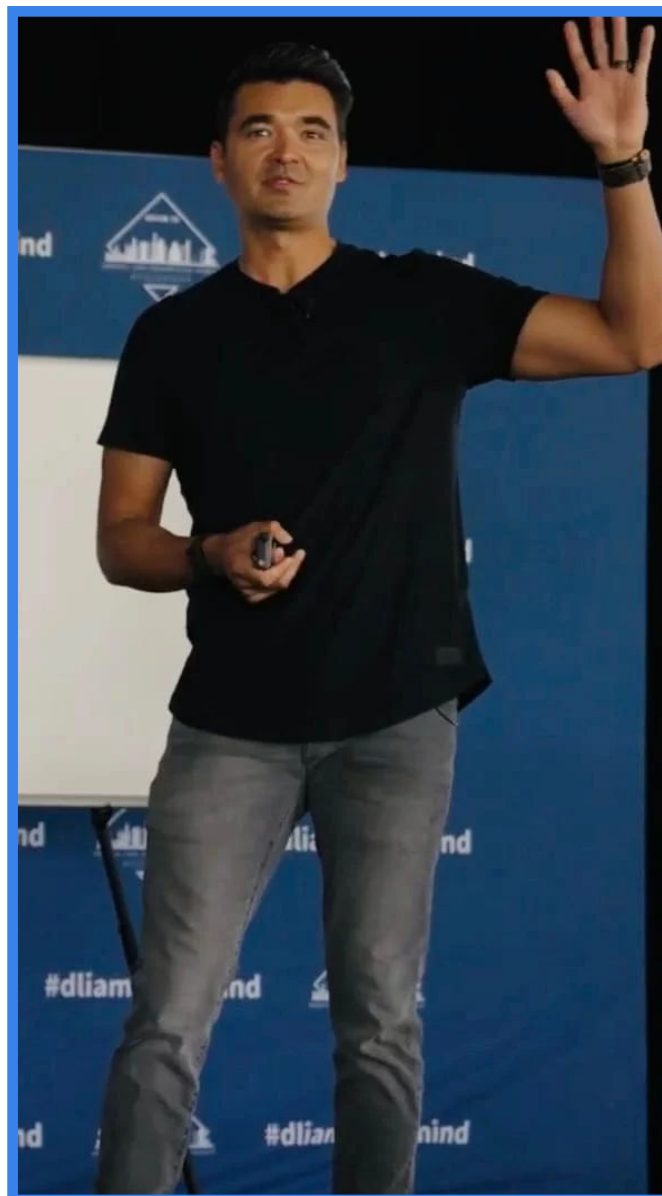
Of course, we're still huge proponents of working hard, but we're challenging the status quo and redefining the rules of the game — so advisors can build a successful business that supports their ideal lifestyle (and NOT the traditional definition of success that's being perpetuated by "top producers"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

#### **Booking Appointments**

(on auto-pilot)

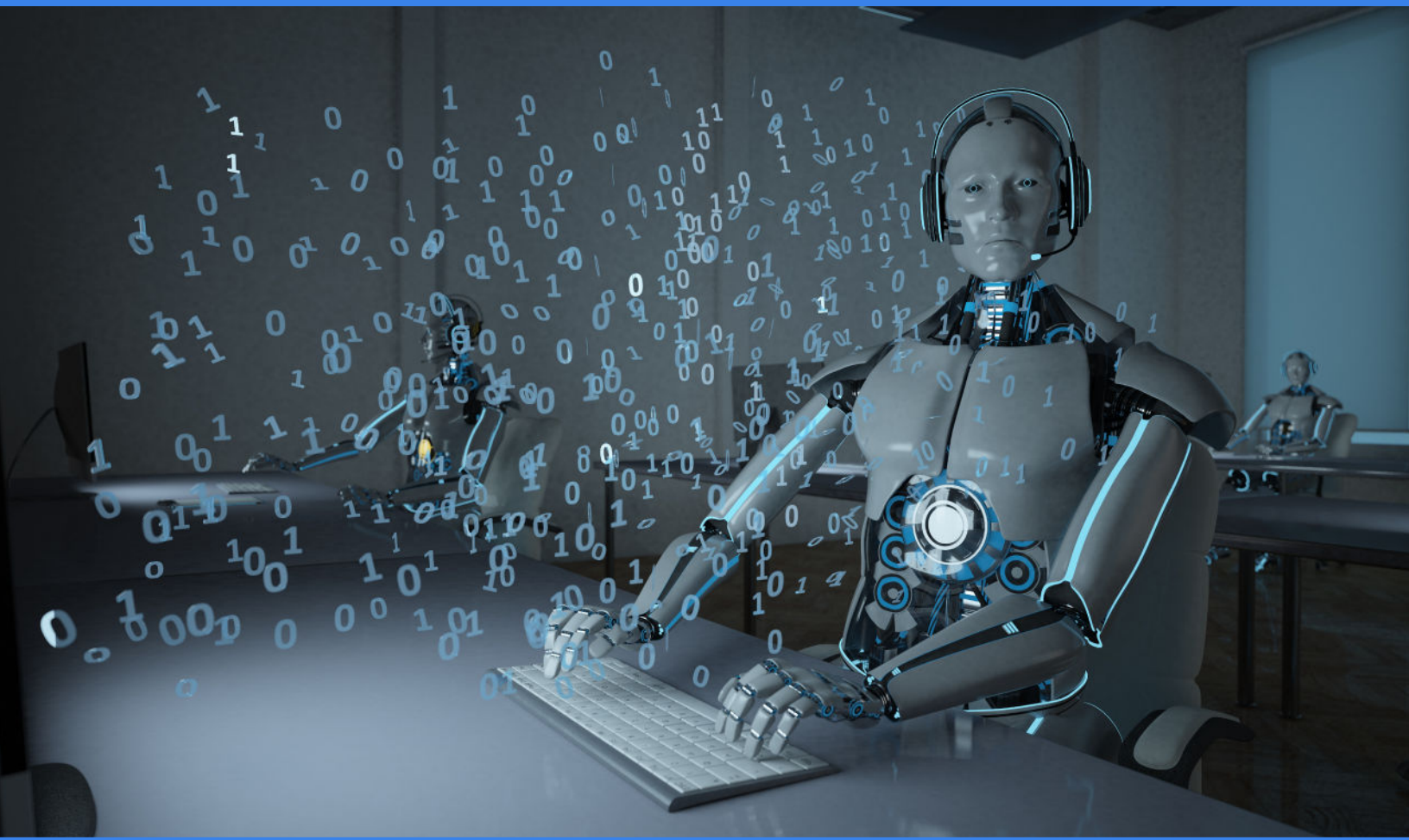
We use automated email sequences to inform, educate, and inspire prospects to request an appointment with you in conjunction with highly trained appointment setters that call your leads on your behalf.

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 MARKETING PLATFORM](#)**

# 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.

**[Need some proof? Click here to see a few of our most recent advisor success stories...](#)**

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! **Which 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:

Jump on a "Discovery Call" with my team where we'll walk you through how to predictably close more annuity business with our done-for-you digital marketing system.

During this 1:1 call, we'll walk you through:

- How to grow your practice with just an internet connection and a cellphone.
- The types of prospects we target and how we consistently generate highly targeted traffic, leads, and appointments.
- 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.

If we're not a good fit to work together, we'll be the first to tell you and recommend resources for you (whether that's working with a different marketing group or plugging into free resources we provide).

Oh and by the way, if you've already booked your Discovery Call with our team, thanks for reaching out — you should have already received the meeting confirmation details via email and we look forward to chatting with you soon.

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 book your Discovery Call with us, where we'll walk you through step-by-step our entire digital marketing program.

**[CLICK HERE TO BOOK YOUR DISCOVERY CALL 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 going to help me drive traffic?

**Question No. 2:** How are you going to generate annuity 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 your FMO or 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 not you're now armed with "insider" information to help you make informed decisions regarding the best ways to invest your advertising dollars in the Digital Age.

If you'd like to know ALL of the most critical digital marketing questions you should ask your marketing group or FMO, click the link below:

**[Advisor Digital Marketing Exposed - The Top Marketing Questions You Should Ask Your FMO Or Marketing Service Provider](#)**

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?  
Give us a call or shoot us a text at (707) 520-9187

# FREE BONUS RESOURCES TO HELP ADVISORS SUCCEED IN THE DIGITAL AGE

If you would like to attend a Virtual Advisor Mastermind session as a guest, simply request a guest pass during your Discovery Call. This is a perfect way to experience the value of being part of an exclusive group. [To book your 1-1 Discovery Call click here.](#)

## WATCH OUR MOST POPULAR VIDEO TRAININGS ABSOLUTELY FREE:

### [Traffic Generation Secrets - How To Drive Perpetual Qualified Annuity Traffic To Your Website](#)

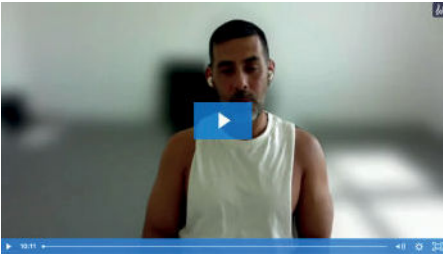
In this livestream, I'll give you a sneak peek inside a successful annuity traffic campaign. Over the last decade-plus of working in this industry, I've discovered that very few marketing groups ever talk about how to drive traffic. The fact is that it's impossible to build and run a successful (virtual) practice with just an Internet connection and a cell phone, IF you do not have quality and consistent online traffic.

### [NO B.S. Digital Marketing - How To Generate Endless Annuity Leads & Qualified Appointments in the Digital Age](#)

This livestream is specifically on how to generate annuity leads with digital marketing. Everything I share is based on what's working right now. No fluff, or hype. You'll see some of the most recent annuity leads that we generated from the prior 24 hours and I'll walk you through actual ads, funnels, email campaigns, and how we convert leads into qualified appointments.

Have any questions or comments?  
Give us a call or shoot us a text at (707) 520-9187

# DON'T JUST TAKE MY WORD FOR IT... SEE A FEW OF OUR MOST RECENT ADVISOR SUCCESS STORIES BELOW

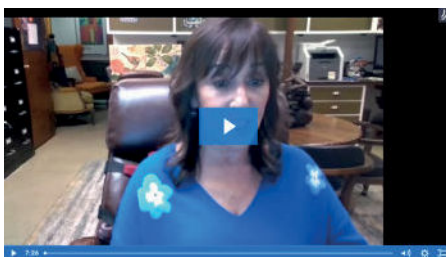


## [How To Close FIAs 100% Virtually In Shorts & A Tank Top - Without An Office, Staff Or Any In-Person Meetings.](#)

Mike ditched dinner seminars and live events, built a \$10M practice, and gathered over \$15M in AUM after partnering with us.

## [Former MMA Cage Fighter Reveals How He Built A Wildly Profitable Purpose-Driven Practice - Without An Office, Staff, Or Any In-Person Meetings.](#)

Former MMA cage fighter Sean, along with his newly licensed father, built a \$10M practice and gathered \$4M in AUM this past year.

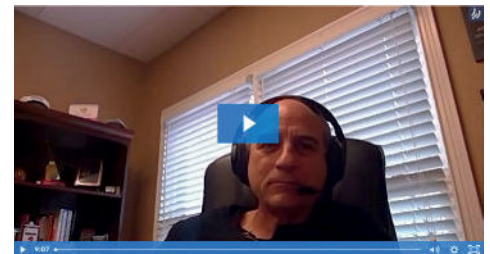


## [How A Former Teacher Turned Advisor Built A Thriving And Profitable Virtual Practice - Without Sacrificing Her Health Or Family.](#)

Barbara, a former teacher turned advisor, built a thriving \$4M virtual practice, without sacrificing her health or family.

## [From Staring Death In The Face To Building A Successful Virtual Practice From Scratch.](#)

After taking a sabbatical from the business due to serious health issues, overcame tremendous adversity and built his dream business.



## [How A Part-Time Advisor Earns More Than His Full-Time Job - Working Only 10-15 Hours a Week.](#)

Brian, a part-time advisor, built a \$3M financial practice and earns more than his full-time job, working only 10-15 hours a week.

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

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