



Digital Marketing Provides Incredible Growth Opportunities At A Lower Cost Than Other Marketing Strategies

March 7, 2019

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Presented by





Marketing for Success

Jarrold Florence

VP of Sales, Magellan Financial

MAGELLAN
FINANCIAL
& INSURANCE SERVICES, INC





Digital Marketing in 2019

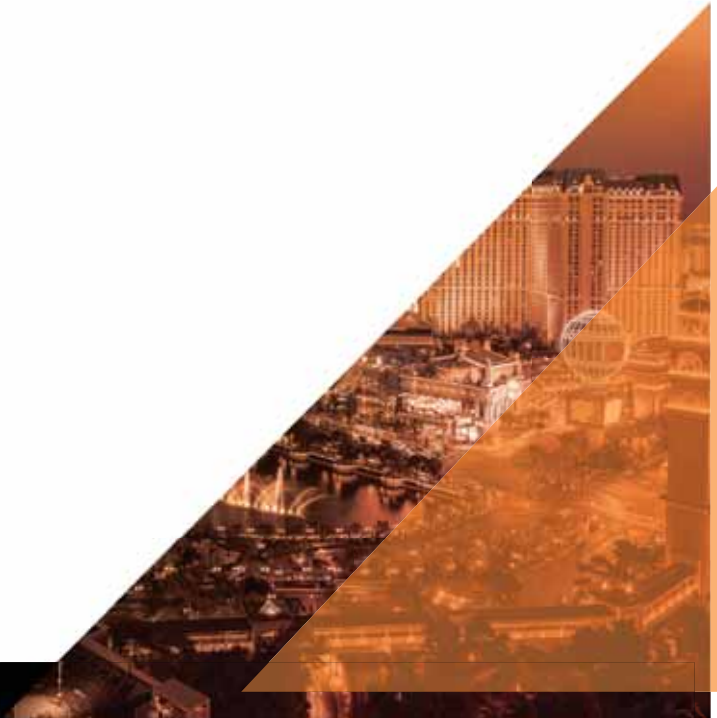
Alex Stanchfield

Senior VP of Marketing at A4 Digital



MARKETING IN 2019:

Top 3 Advisor Mistakes



Proven Marketing Results



90,000,000+

Online Content Views



\$4,000,000+

Advertising Spend



100,000+

Online Registrations



3,000+

Workshops Hosted

3 Advisor Mistakes

CAUTION: BUYER BEWARE

Be careful of courses or mastermind groups charging \$997, \$2997 or more and making unrealistic promises

3 Advisor Mistakes

MISTAKE #1: ASSUMPTIONS

Don't assume your audience cares about your product or service, let the data tell you what they like.

3 Advisor Mistakes

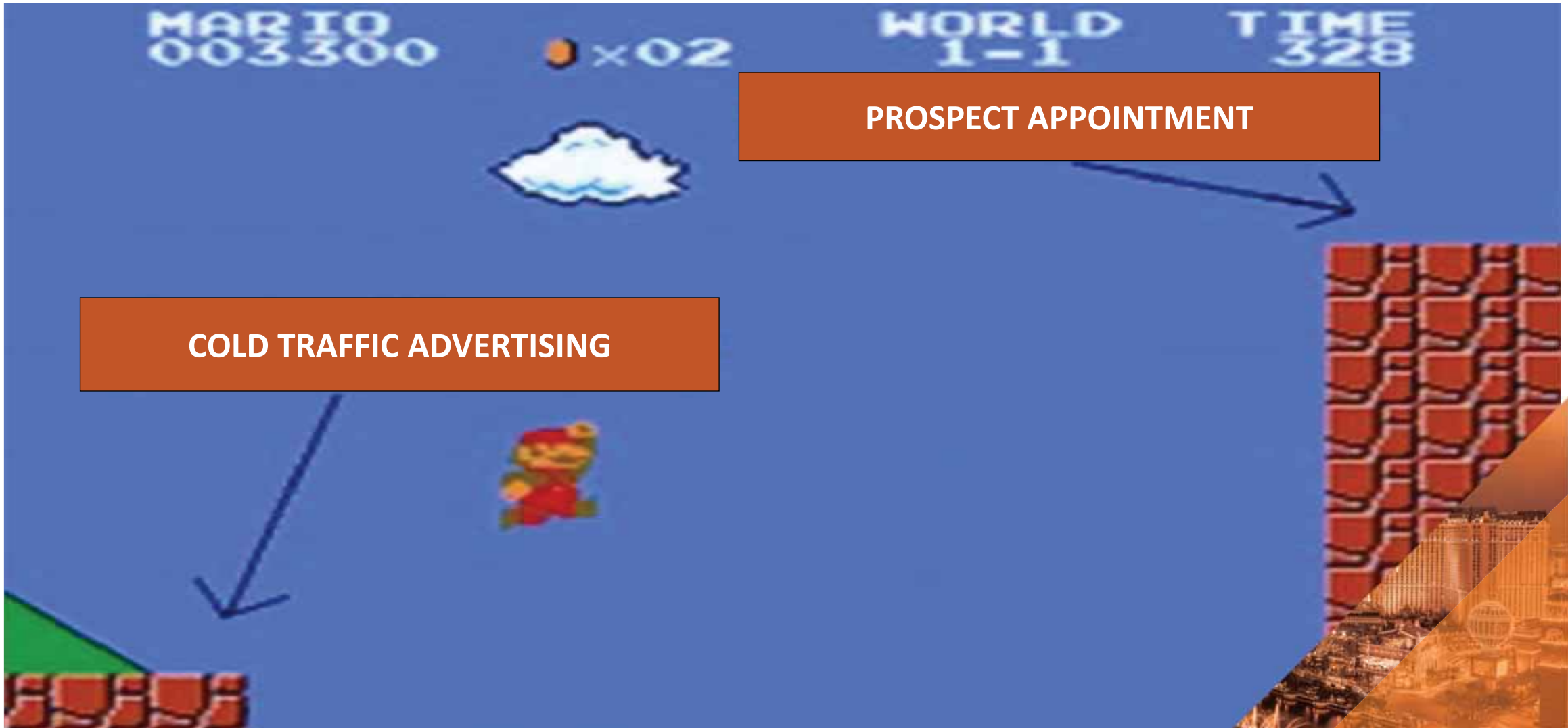
MISTAKE #2: VALUE

Don't forget to provide real value before asking for anything in return from your audience.

3 Advisor Mistakes

MISTAKE #3: APPOINTMENTS

Asking for appointments instead of inviting to workshops can produce expensive and unqualified leads.



FIND YOUR IDEAL CLIENT

The first step towards setting up a successful marketing campaign is understanding your audience.

WHY HOST WORKSHOPS?

Think of workshops as a way to have 25+ first appointments time where you can educate and identify ideal clients.

MARKETING IN 2019:

Building a Workshop Funnel



Workshop Funnel

STEP 1: CHOOSE A LOCATION

Find educational venues that are close to population, providing easy access to highways and ample parking.

Workshop Funnel

STEP 2: TARGET YOUR ADS

Focus on interests and behaviors of your ideal audience, not traditional income or net worth demographics

Workshop Funnel

STEP 3: WRITE YOUR ADS

We use multiple images and videos, along with short and long form version of our script. Let FB optimize for you.

 Retirement You Workshops
Sponsored (demo) · 🌐

Want to Maximize Social Security & Retirement Income? Learn the 2019 updates, rules and strategies at the "FREE Social Security & Retirement Workshop".

*Free Admission - Click to Register Online:
<http://www.retirementyou.com/ryf119...> See More



FREE ADMISSION - REGISTER ONLINE
SOCIAL SECURITY & RETIREMENT WORKSHOP

RETIREMENTYOU.COM
 1/19 in Fort Walton Beach - "FREE Social Security Workshop" [Sign Up](#)

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Why Should You Attend the Workshop?

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- ✔ **Increase Retirement Income:** Social Security is the first or second largest retirement income source for most of us and not knowing all the options can cost \$1,000's in future benefits.
- ✔ **Learn the Latest Updates:** Each year, Social Security announces changes that affect current and future filers. Learn how these changes might affect you so you can know your options before you file.
- ✔ **Qualify for Special Filing Strategies:** The latest budget phased out some of the special filing strategies, at the workshop we'll review the strategies in detail, the requirements to qualify and alternatives if you aren't eligible.
- ✔ **Avoid Long SSA Lines:** There are more than 60 million people collecting and only 1,200 offices nationwide, which can mean long waits and limited time for questions. Our workshop can help answer common questions without the hassle.
- ✔ **Free Customized Planning Report:** Everyone who attends the workshop will receive a FREE, No Obligation 1-on-1 Social Security Planning Session, which includes a customized Retirement Income Report based on your specific situation.

Space is Limited, Click Here to Register:

<http://www.retirementyou.com/ryf119>

 **Retirement You Workshops**
Sponsored (demo) · 🌐

Have you noticed all the recent Social Security and Tax Reform changes?
To learn how the 2019 updates impact income for current and future retirees, join us at Maggiano's in North Scottsdale for the "Retirement You Workshop". Dinner is on us!
*For FREE Tickets, Register Online Here:... [See More](#)



Join Us For Dinner!
Maggiano's Little Italy in North Scottsdale

RETIREMENTYOU.COM/AZDINNER
**Questions About Social Security & Taxes? Join Us At
Maggiano's For Dinner...On Us!**

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2019 Workshop Topics Include:

- ✓ **Social Security Changes & Filing Strategies:** Each year, the Social Security Administration announces important changes that can have a big impact on retirement income. Learn the latest updates and what you can do now to be prepared.
- ✓ **How Tax Reform Impacts Your Retirement:** Tax reform has been a hot topic since the last presidential election. Learn how you can use the latest tax rules to your advantage and reduce future taxes to help increase "spendable income".
- ✓ **Retirement Contribution & Rollover Rules:** As 401(k), 403(b), TSP and IRA accounts have become more popular, the burden has shifted to individuals to make their money last. Learn which ages are most important and the rules you need to know.
- ✓ **Reducing Risk Without Giving Up Returns:** As you age, looking at the amount of risk you are taking becomes more important. Learn how to generate consistent, competitive returns without taking too much risk in the market.
- ✓ **Your Customized "3 Step Retirement Plan":** The #1 Fear of Retirees is running out of money. Learn how to avoid this fear and build a successful retirement plan focused on income with our simple, 3 step planning process.

*For FREE Tickets, Register Online Here:
www.retirementyou.com/AZDinner

Workshop Funnel

STEP 4: AD OBJECTIVE

Facebook offers several ways to optimize. We use conversions, landing page views and clicks.

Workshop Funnel

STEP 5: LANDING PAGES

To help maximize conversions, focus on the end result and eliminate any additional distractions.


RETIREMENT YOU
 TRAINING WORKSHOPS

Join Us in Fort Walton Beach, FL
January 19th at 10:00am

EDUCATIONAL WORKSHOP - GET YOUR FREE TICKETS
"2019 Social Security & Retirement Workshop"
 Learn the Latest Strategies to Maximize Social Security, Reduce Taxes and Increase Income at the Retirement You® Training Workshop. To get FREE Tickets, click the button below.



Saturday Jan. 19th, 2019
The Workshop Starts at 10:00am

Fort Walton Beach Library
185 Miracle Strip Pkwy SE - Fort Walton Beach, FL 32548

GET FREE TICKETS

TOPICS INCLUDE:




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Workshop Funnel

STEP 6: AUTOMATION

To communicate with registrants in real-time, we use automation software to send text and e-mail messages.



Workshop Tickets For:

Alex Stanchfield

ADD TO CALENDAR

Hi Alex,

Congratulations! Your registration was successful and your attendance is confirmed for the Retirement You® Workshop. We look forward to seeing you at the event!

Now that you've taken the first step and registered, here is some helpful information to know before you attend the workshop..

- Your attendance is confirmed and tickets are not required for entry
 - Download the calendar reminder for complete workshop details
- The event location address, date and time are listed below
The workshop is 100% educational and no products will be sold

To download the "2019 Social Security Cheat Sheet", please visit:
turn-view.com/?pid=MzU35684&v=2

RETIREMENT YOU® WORKSHOP

January 1, 2019 at 6:00pm

Chandler Downtown Library
22 S. Delaware Street
Chandler, AZ 85225

FREE ADMISSION

Ticket Type

Are You Bringing a Guest?



**For Verification Only*

Add Event To Calendar



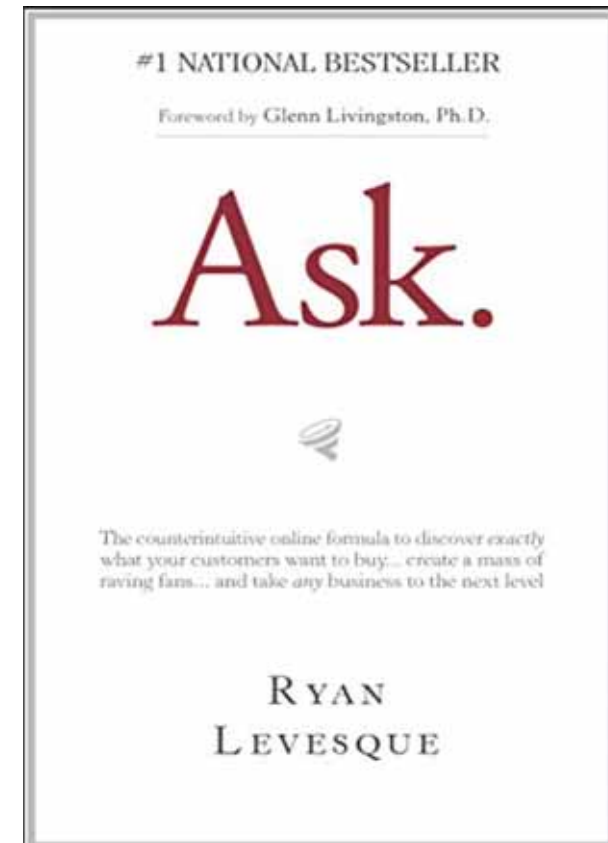
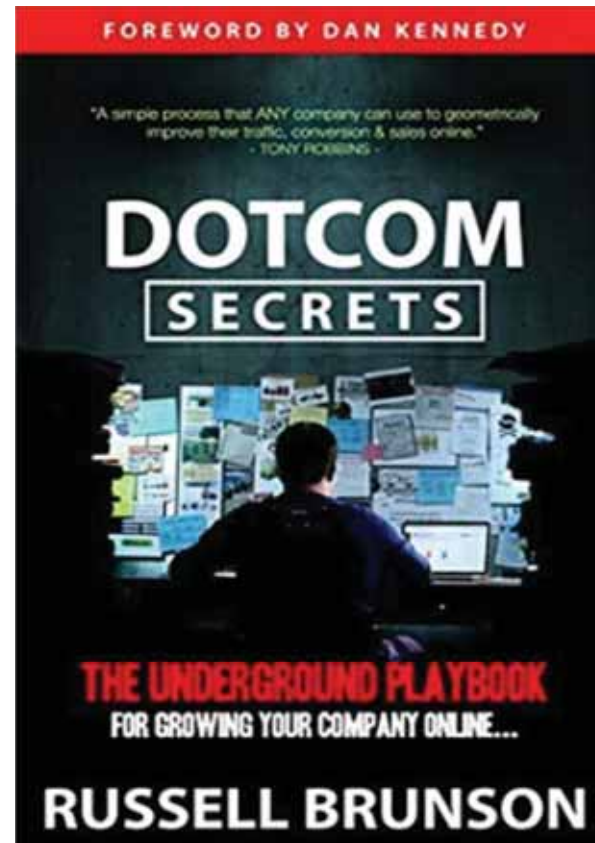
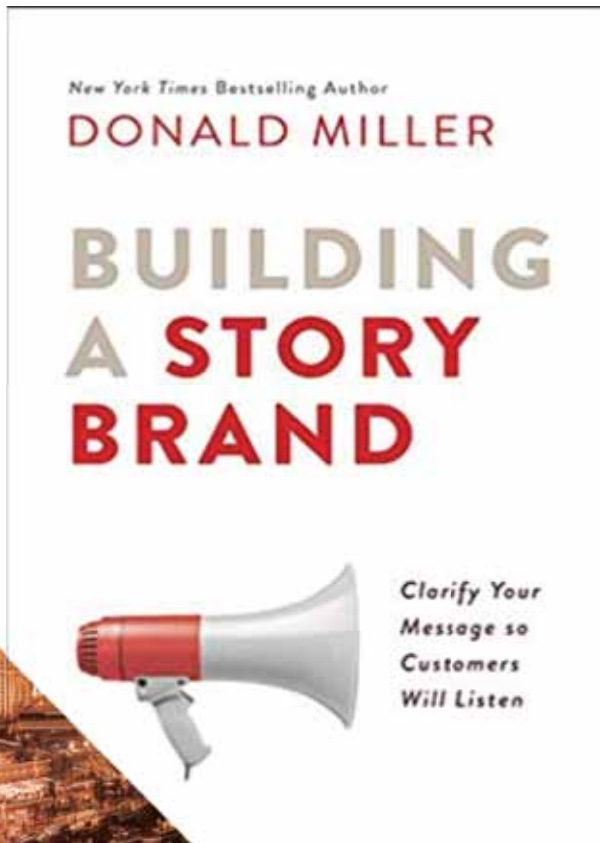
At Retirement You®, our mission is "Motivation Through Education". Remember, knowledge is power, but only if you use it. Our events are 100% educational, hosted by local financial professionals and there is no charge or further obligation required.

Workshop Funnel

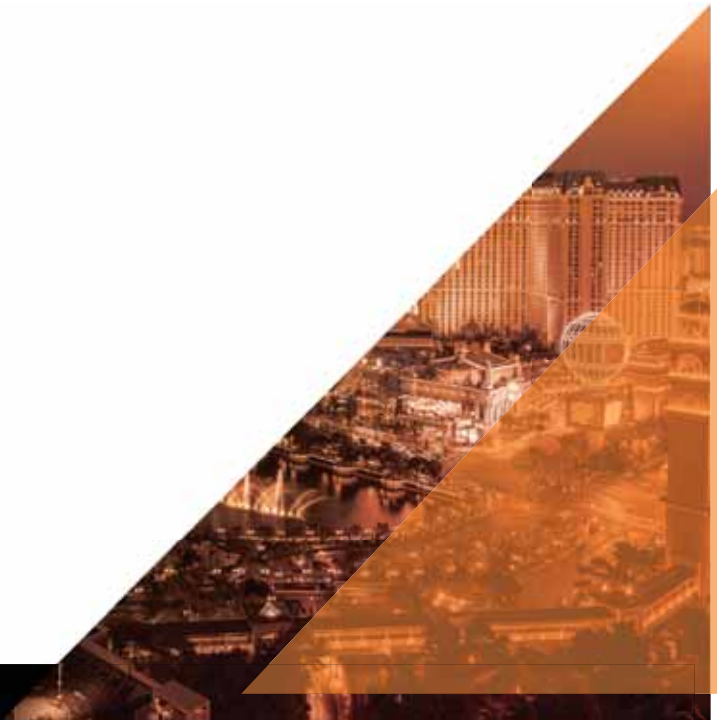
STEP 7: OPTIMIZATION

To improve the program, we test new ad scripts, images, page designs and more from our Arizona office.

Additional Resources



MARKETING FOR SUCCESS



Proven Marketing Results

2017 By The Numbers

- 245,883 Unique Visitors
- 31,719 Unique Registrations
- 12.9% Conversion Rate

2018 By The Numbers

- 234,866 Unique Visitors
- 36,874 Unique Registrations
- 15.7% Conversion Rate



Workshop Setup

Getting Started

- 2 weeks lead time (Online only)
- 4-5 weeks lead time (Mail)
- Find a Location
 - Libraries, Community Centers, Senior Center, Museums, Wineries, Restaurants
- Consider Day of Week & Time
 - Monday-Thursday: 6:00pm or 6:30pm
 - Saturday AM: 9:30am or 10:00am



Workshop Setup

Things to Consider

- High Traffic Areas (Rush Hour)
- Parking at or Near Venue
- Location Name
- Equipment Needed
- Test GPS Directions
- Close to Population Center



Workshop Setup

Things to Consider

- Event Roster & Nametags
- Branded folders & handouts
- Assistant to help with check in
- Calendar for scheduling
- Back up batteries, extension cord, etc.
- Classroom set up



Program Updates

2019 Enhancements

- Simplified Landing Pages
- Customized RY Tickets
- Consolidated Presentation
 - Social Security
 - Tax Reform
 - Indexing
 - Income Planning



2019 Workshop Registration Page (Long):

A customized registration page will be created for each workshop date you schedule, with a unique URL hosted at www.RetirementYou.com.



RETIREMENT YOU
TRAINING WORKSHOPS

Join Us in Chandler, AZ
January 1st at 6:00pm

EDUCATIONAL WORKSHOP - GET YOUR FREE TICKETS

"2019 Social Security & Retirement Workshop"

Learn the Latest Strategies to Maximize Social Security, Reduce Taxes and Increase Income at the Retirement You® Training Workshop. To get FREE Tickets, click the button below.

Tuesday January 1st, 2019
The Workshop Starts at 6:00pm

Chandler Downtown Library
22 S. Delaware St. - Chandler, AZ 85225

GET FREE TICKETS

FREE ADMISSION

2019 Workshop Registration Page (Short):

A customized registration page will be created for each workshop date you schedule, with a unique URL hosted at www.RetirementYou.com.

RETIREMENT YOU
TRAINING WORKSHOPS

Stockyards Steakhouse
Tuesday Dec. 11th at 6:00pm
3009 E Washington St. #115 - Phoenix, AZ 85034

LIVE TRAINING WORKSHOP - GET YOUR FREE TICKETS

"2019 Social Security & Retirement Workshop"

Learn the Latest Strategies to Maximize Social Security, Reduce Taxes and Increase Income at the Retirement You Training Workshop. To get FREE Tickets, complete the registration form.

Complete This Form to Request FREE Tickets:

First Name:

Last Name:

E-Mail Address:

Phone Number (Mobile):

Mailing City:

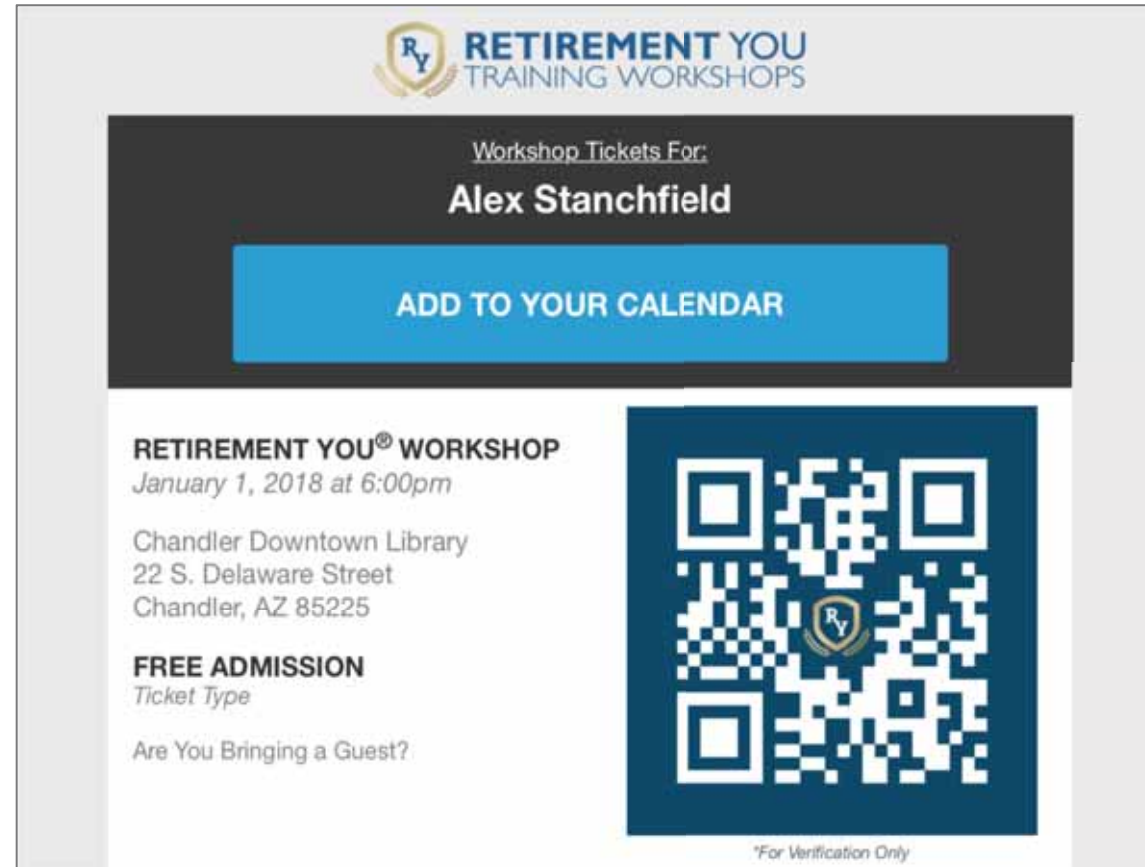
Mailing State:

Are You Bringing a GUEST?

SUBMIT REQUEST

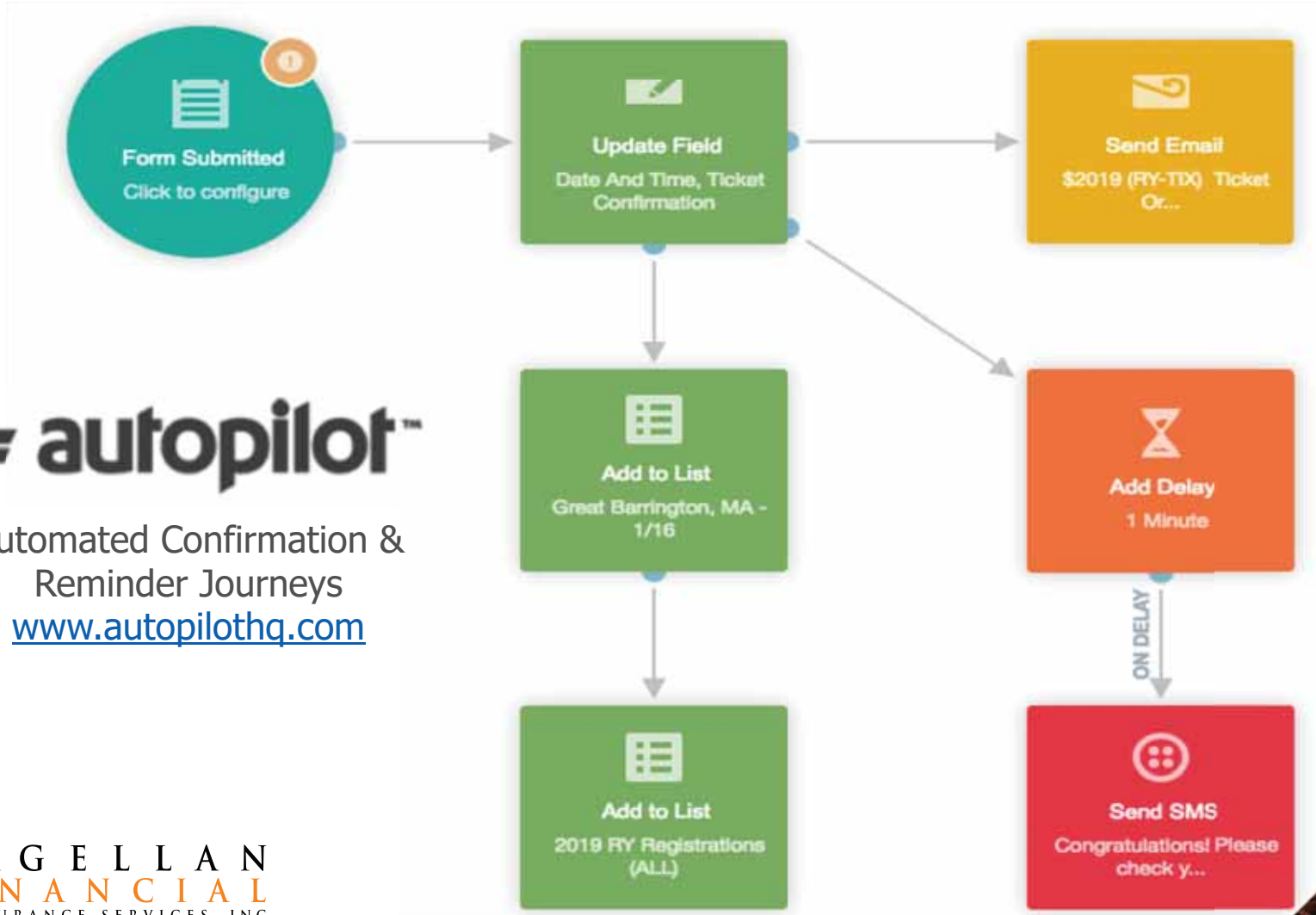
2019 Customized Retirement You® Tickets:

After a registration is submitted, your attendees will receive a customized ticket from our ticketing system. The streamlined order process is designed to increase commitment and attendance rates.



Customized E-Mail & Text Automations:

After a registration is received, our system will send confirmation e-mails and text reminders, along with a custom calendar invitation for each date.



autopilot™

Automated Confirmation &
Reminder Journeys
www.autopilothq.com

Additional Resources



Relevant Workshop Topics

- Social Security Changes & Strategies
- Retirement Taxes & Reform
- Risks, Indexing & Income Planning

2019 "Cheat Sheets"

- Social Security
- Retirement Taxes
- Fixed Annuities

2019 Pricing Options

BRONZE
\$895

Per Workshop Date

15 Registrations/Date

GUARANTEED*

w/ NO LEAD CAPS

SILVER
\$1495

Per Workshop Date

25 Registrations/Date

GUARANTEED*

w/ NO LEAD CAPS

GOLD
\$1995

Per Workshop Date

35 Registrations/Date

GUARANTEED*

w/ NO LEAD CAPS

MOST POPULAR

**Guarantees are offered for approved locations and areas only. New markets are subject to availability and approval by Magellan Financial. Additional pricing tiers above the Gold Level are available by request only and do not provide any additional guarantees (35 Max).*

Setting Expectations



The Opportunity

After the 2nd Meeting, the expectation should be to have a realistic sales opportunity with between 50-60% of clients that you reviewed a Social Security & Income Planning Report with. Based on the response rates, this would equate to an average of 5-7 sales opportunities.

Setting Expectations



Return on Investment

Looking at conservative closing numbers, Retirement You® Workshops provide consistent return on investment. The example above assumes just 2 new annuity clients and an average case size of \$100,000. The return is still over 9x your initial investment.

Consistency is Key

Develop a Consistent, Sustainable, Cost-Effective Marketing Plan

- Utilize Digital Marketing
- 2-3 Workshops Per Month
- \$1,000 - \$1,500 Budget Per Event
- \$2,000 - \$4,000 Total Budget
- Approx. 25 New Appointments
- Increase ROI & Business



Consistency is Key

Real Results From Real Producers

Since the start of 2017, over 50 of our top producers have sold \$4 Million or more in Annuity/AUM Business using the Retirement You® system. 17 of the top 20 Magellan producers currently host monthly workshops. The key to producing results is a commitment to consistent marketing.



Additional Resources



1st Appointment

- Why do we need a fact finder?
- How is our process different?

2nd Appointment

- Reviewing the Retirement Report(s)

3rd Appointment

- Creating a Retirement Income Plan & Making Recommendations

Sample Case Study

Recent Campaign

- January 2019 Workshop
- Fort Walton Beach, FL
- \$1995 Total Budget
- 72 Households (\$25.33/each)
- 108 People (\$14.51/each)
- 14.7% Conversion Rate

*Results will vary and are not guaranteed.





Page Overview

[VIEW HEATMAP](#)

Visitors

523 / 524 all time

Conversions

77 / 77 all time

Conv. Rate

14.7% / 14.7% all time

Cost / Visitor & Cost / Lead

Connect your ad network account to unlock detailed cost insights

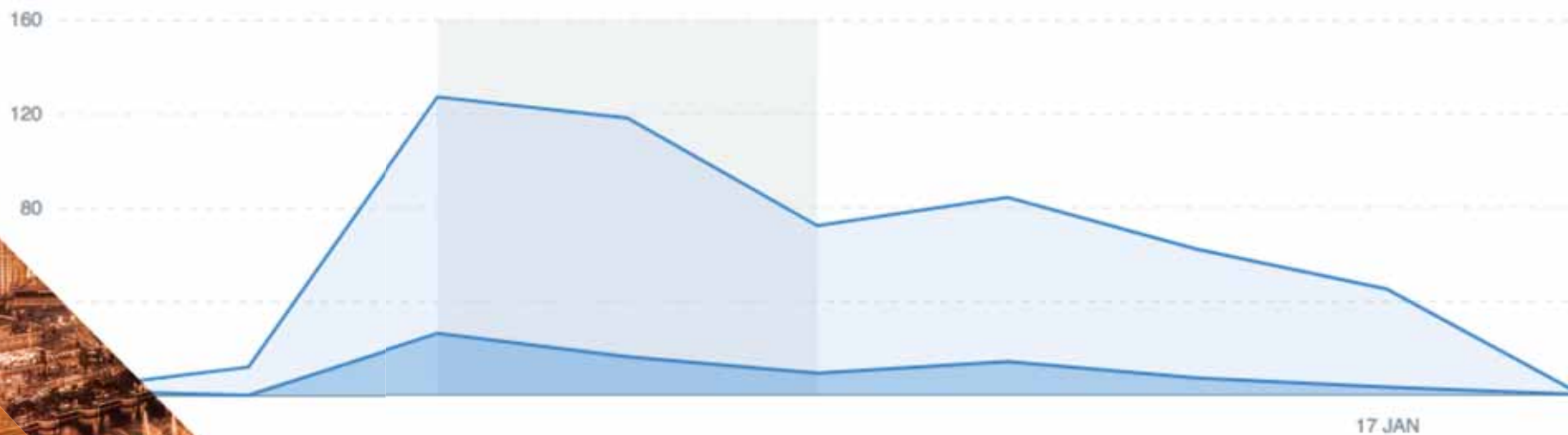
Performance

COUNT

RATE

Visitors

Conversions



Page Overview

Visitors

402 / 402 all time

Conversions

52 / 52 all time

Visitors

ALL

UNIQUE

Device

ALL

DESKTOP

MOBILE

Traffic

BLENDED

PAID

ORGANIC

CONNECT

Cost / Lead

12.9% / 12.9% all time

Connect your ad network account to unlock detailed cost insights

VIEW HEATMAP

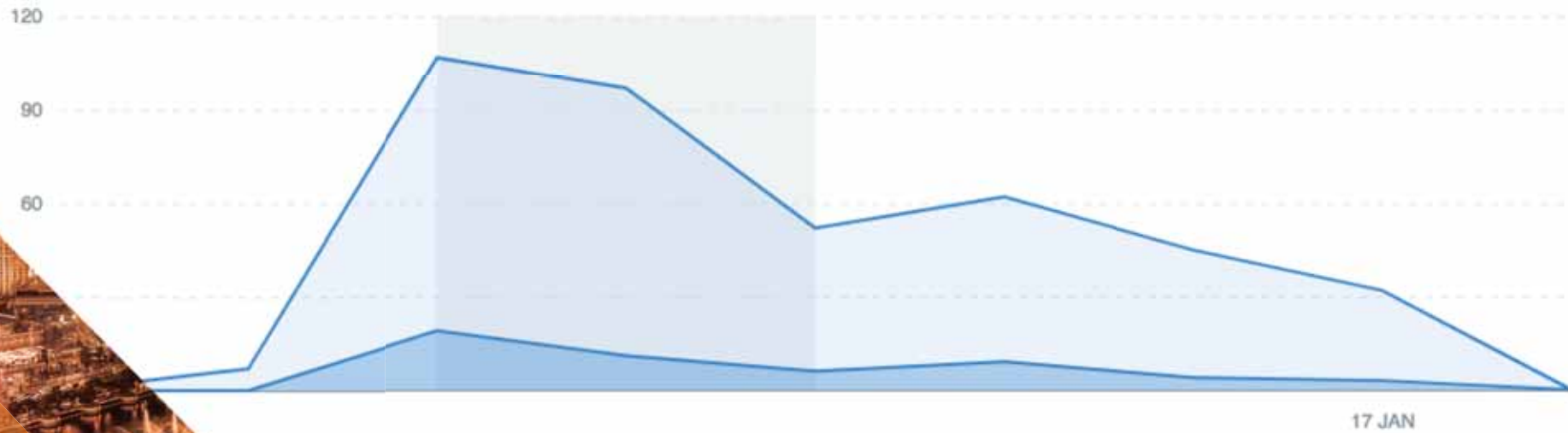
Performance

COUNT

RATE

Visitors

Conversions



Closer Look at Guarantees

- Attendance is Not Guaranteed
- Guarantees Cost Money
- Which Would You Prefer?
 - Option A: Guaranteed Results, \$250 Per Attendee.
32 Attendees = \$8,000
 - Option B: Not Guaranteed, \$50 Per Reg. @ 40% Attendance.
32 Attendees = \$3,995

Over **50% Better** Results

Stop Paying for Guarantees



If We Charged \$250 Per Attendee
and Averaged 40% Attendance...
2017-2018 Gross Profit Would Increase

\$4,615,575

68,593 Units * 40% Attendance = 27,437 Attendees
27,437 Attendees * \$250 Gtd. Rate = \$6,859,250 Cost
\$6,859,250 Cost - \$2,243,675 Total Cost = \$4,615,575 Profit

New Guaranteed Registrations



STEP 1: Choose a Target Market Area

Find an area as close to population as possible and work with your marketer to determine how many workshops this market will support.



STEP 2: Choose an Approved Location

Find a location that is well and focuses on education. Approved locations include libraries, community centers and senior centers.



STEP 3: Submit Your Workshop Date(s)

Work with your Magellan Marketer to finalize your workshop locations and times. We currently have a 3 week flexible turnaround time for setup.

Join Magellan in Las Vegas



- April 3-5, 2019 at NYNY Hotel & Casino in "Fabulous Las Vegas"
- Learn Proven Sales Strategies for Annuities, AUM & Life Insurance
- See How Our Digital Marketing Platform Generated 100,000+ Leads
- Meet Top Producer, Phil From TX, Who Wrote \$100M in Under 2 Years
- We Cover Airfare, Hotel, Meals & Training For Qualifying Producers



***To see if you qualify, call 866-779-3553**