Power Session LIVE

powered by Real Wealth®

The Family Meeting

Featuring Jim Silbernagel, CFP®, LUTCF

- Enhance the value of your practice
- Create unlimited referrals
- Earn & keep AUM
- Strengthen client relationships

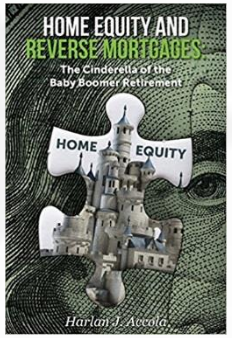
Friday, March 8th

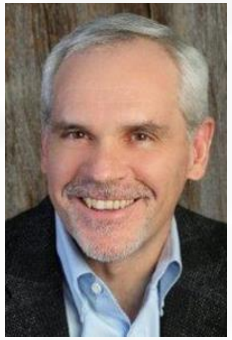
Today's session is sponsored by:

FAIRWAY
INDEPENDENT MORTGAGE CORPORATION

www.RealWealthMarketing.com/freebook

Free book in today's follow up email





by Harlan J. Accola, CRMP

Advanced Applications: Reverse Mortgage Research In Retirement Planning

Free training & CE
4/16/19

Can't hear? Dial in for best audio quality: **(415) 655-0052** / **Code: 276-052-778**
Pin will appear on your webinar panel

Today's Guest Expert

Jim Silbernagel, CFP®, LUTCF

Member Forum 400

- 24 Year Life & Qualifying Member of MDRT
- Qualified for his first TOT in 2000
- NAIFA Member since 1989
- 18 Year Member Forum 400
- International Speaker at organizations including MDRT, Forum 400, NAIFA, FPA, and more
- Ambassador for Main Street Philanthropy
- Founder & Host of *Real* Wealth® and *Power Session* LIVE
- Serves Middle America in Kewaskum, WI (Population: 4,004)
- **Currently working with his 5th generation client**

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Disclaimer

Jim Silbernagel and The Silbernagel Group, Inc. do not provide tax, legal or accounting advice. This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal or accounting advice. You should consult your own tax, legal and accounting advisors before engaging in any transaction.

Benefits of The Family Meeting

- It’s the right thing to do
- Creates peace of mind within the family
- Increases value of the business
- Built-in referral source
- Clients will self-screen
- Creates planning opportunities

Preparing for the meeting

- Set the stage with clients
  - The importance
  - The ground rules
  - The invitees (family means family)
- Schedule the meeting
  - Schedule the kids

Meeting Agenda

Male (/ / -) **& Female** (/ / -) **Last Name**

Prior Discussion:

Estate Plan:

(Attorney) Trust dated

Amended:

Successor Trustee/ Personal Rep:

HCPOA:

DFPOA:

Guardian:

- Any questions or desired changes?

Insurance Planning:

LTC: (Carrier, plan design, premium amount & mode, paid to)

Life: (Carrier, plan design, premium amount & mode, paid to)

Health: (Carrier, plan design, premium amount & mode, paid to)

- Ok for P&C Review?
- Life Insurance Needs Planning?
- LTC Planning?

Financial Planning:

- **Review Investment Summary**

Miscellaneous Planning:

- Business Planning?
- Tax Planning?

Discussion:

Action Items:

Next Agenda:

Anywhere Dr * Anytown, WI 53005 * H: (262) 654-7080
John (1/15/1938 - **76**) **and Mary** (8/10/1938 - **75**) **Smith**

Date:	01/20/2014	**Time:**	5:00-6:00 pm	**Location:**	RESIDENCE
Last Mtng:	01/06/2013	**Ref:**		**Anniv:**	
Attendees:	John, Mary and Agent				
Veteran:	Yes or No			**Email:**	

Prior Discussion:

Estate Plan:
Attorney Name
John Smith and Mary Smith Family Trust dated June 5, 2002
Succ TTEE and Pers Rep: Son, then Son, then Daughter
HCPOA: Spouse, then Son, then Son, then Daughter
FPOA: Spouse, then Son, then Son, then Daughter

ILIT: John and Mary Smith Irrevocable Trust 1 / dated 6-10-1998
Son TTEE, then Daughter, then Son

1) Any questions or desired changes?
2) Trust copy at S&J
3) **ILIT** – Review meeting discuss TTEE role?

Insurance Planning:
LTC: Active XYZ policies / Both Insured / Lifetime benefits / 90 day elimination /
Current daily benefit $311.84 (issued at $150) / NH and 80% alternate facility / Issued 4-17-1998 /
Paid till 4-17-2014
*Current annual premiums John $1,775.31 / 3.2% Inflation Rider (effective 4-17-2013) / was 5%
*Current annual premiums Mary $1,429.28 / 3.2% Inflation Rider (effective 4-17-2012) / was 5%
Health: Active Medicare Supplement / Group coverage / John Insured / Effective 06-01-2004 /
Monthly premium $286.41
Health: Active Medicare Supplement / Group coverage / Mary Insured / Effective 10-1-2003 /
Monthly premium $240.73 / No Part B deductible
Active: Part D Standard Plan / John Insured / Applied 1-10-2006 / SSA monthly deduction $45.90
Active?: Senior Care / Mary Insured
Life: Active (Converted Term) XYZ / John Insured & Owner / Effective Date 7-24-2008 / Death Benefit
$200,000 / **Quarterly** Premium $2,256 / Paid up to 4-16-2014 / CV $18,027.34 / CSV $12,173.34
Life: Active (Converted Term) XYZ / Mary Insured & Owner / Effective Date 10-24-2008 / Death Benefit
$100,000 / **Semi-annual** Premium $1,732 / Paid up to 4-16-2014 / CV $7,913.33 /
CSV $5,084.33

Anywhere Dr * Anytown, WI 53005 * H: (262) 654-7080

Life: Active XYZ UL policy / Mary Insured / John Owner / Issued 3-09-2004 / DB $100,000 / $1,197 annual premium / Paid till 3-09-2015 / Policy #59-346-064 / CV $18,822.79 / CSV $17,450.05
Life: Active XYZ GNL/ John and Mary Insured / ILIT Owner / Issued 1-23-2004 / DB $500,000 / $5,660.82 annual premium / Paid till 1-23-2015 / Policy #U01807893 / CV $103,680.04 / CSV $89,550.32

SPIA: Active XYZ / John Owner and Annuitant / Effective Date 9-3-2008 / Single Premium $63,634 / Life Only / Annual payouts on October 3rd $6,859.15

1) **Active P&C Clients**
2) Life Insurance Needs Planning? *Active policy information above*
3) LTC Planning? *Active policy information above*

Own Tax Credits / Trust Owner
$30,000.00 / Admitted 5-06-2005

Financial Planning:
1) **Review Investment Summary**
2) **Discuss Income Needs**
    a. LTC Premium Due / $3200
    b. Policy Premium Due / $3900

Miscellaneous Planning:
1) Business Planning?
2) Tax Planning? / (Personal, ILIT, ~~LLC~~ (closed 2012))
3) **INCOME**: 2013

Anywhere Dr * Anytown, WI 53005 * H: (262) 654-7080

Discussion:

Action Items:

Next Agenda:

THE SILBERNAGEL GROUP INC.
Real Wealth Advisors

Mr. and Mrs. Client
Investment Summary as of November 27, 2014

	Owner	Type	Company	Account #	Date	Deposits	WD's	12/31/2010	Curr Value	Holdings	P Bene	C Bene
1.	Mr.	ROTH	Mutual	12345		$24,793.66	$0.00	$16,623.68	$28,872.51		Mrs.	Trust
			Funds		12/7/2004	$15,293.66		$16,623.68	$28,872.51	*Fund A*		
					4-6-06 2005 Cont	$4,500.00						
					12-21-06 2006 Cont	$5,000.00						
2.	Mrs.	ROTH	VA Co	12345		$29,721.34	$0.00	$0.00	$30,711.89		Mr.	Trust
					1/4/2007	$20,889.13		$0.00	$30,711.89	*Growth*		
					1/4/2007	$8,832.21						
3.	Mrs.	ROTH	Mutual	12345		$7,657.00	$0.00	$0.00	$7,792.92		Mr.	Trust
			Funds		4-17-06 2005 Cont	$2,657.00		$0.00	$7,792.92	*Aggressive*		
					12-26-06 2006 Cont	$3,900.00						
					4-19-07 2006 Cont	$1,100.00						
4.	Mrs.	IRA	VA Co	12345		$75,564.63	$20,886.57	$86,906.61	$78,163.25		Mr.	Trust
					3/8/2004	$75,564.63		$86,906.61	$78,163.25	*Growth*		
					ROTH 12/21/06		$20,886.57					
5.	Mr.	NQ	VA Co	12345		$57,070.18	$0.00	$61,257.86	$69,092.47		Mrs.	Trust
					11/4/2004	$9,466.25		$61,257.86	$69,092.47	*Balanced*		
					11/29/2004	$47,603.93						

Account 2:

Current Death Benefit	$34,876.91
Guar. Min. DB Ann Step-Up	$34,876.91
Prin Plus Steps-Up 2/14/11	$35,881.87
5% Ann Incr if No W/d's in First 5 Yrs (Ended '10)	

Account 4:

Guaranteed Min Death Benefit	$75,890.28
Current Death Benefit	$78,163.25
Princ First w/ Annual Step Up	$75,890.28

Account 5:

Guaranteed Min Death Benefit	$75,890.28
Current Death Benefit	$78,163.25
Princ First w/ Annual Step Up	$75,890.28
2010 RMD $1,277.57 / Auto Annually 11/1	

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6.	Mr.	NQ	VA Co	12345		$115,000.00	$0.00	$126,518.05	$141,749.74		Mrs.	Trust
					2/13/2004	$115,000.00		$3,840.05	$4,278.77	Funds		
								$3,801.73	$4,117.66	Funds		
								$3,866.92	$4,368.90	Funds		
								$3,798.17	$4,214.88	Funds		
								$6,394.68	$6,903.70	Funds		
								$6,421.47	$6,931.53	Funds		
								$6,424.51	$6,839.73	Funds		
								$12,907.68	$13,682.23	Funds		
								$3,872.94	$4,230.33	Funds		
								$12,524.79	$14,160.58	Funds		
								$6,285.36	$7,081.90	Funds		
								$6,291.98	$7,134.70	Funds		
								$12,606.14	$14,236.57	Funds		
								$12,522.27	$14,535.06	Funds		
								$12,495.68	$14,477.65	Funds		
								$12,463.68	$14,555.55	Funds		

Guaranteed Min Death Benefit	$115,000.00
Current Death Benefit	$141,749.74
Riders: Principal First	$115,000.00

	Owner	Type	Company	Account #	Date	Deposits	WD's	12/31/2010	Curr Value	Holdings	P Bene	C Bene
7.	Mrs.	NQ	VA Co	12345		$115,000.00	$0.00	$128,115.04	$146,788.80		Mr.	Trust
					2/13/2004	$115,000.00		$6,679.93	$7,089.89	Funds		
								$6,503.90	$7,281.99	Funds		
								$6,323.88	$7,258.89	Funds		
								$6,716.59	$7,117.00	Funds		
								$6,500.65	$7,380.65	Funds		
								$6,349.31	$7,146.73	Funds		
								$6,406.75	$0.00	Funds		
								$6,373.39	$14,778.52	Funds		
								$6,403.94	$7,408.44	Funds		
								$6,416.76	$7,307.37	Funds		
								$6,330.94	$7,365.01	Funds		
								$6,377.76	$7,211.20	Funds		
								$6,422.02	$7,359.25	Funds		
								$6,300.74	$7,366.68	Funds		
								$12,624.02	$14,999.41	Funds		
								$12,710.91	$14,934.12	Funds		
								$12,673.55	$14,783.65	Funds		

Guaranteed Min Death Benefit	$115,000.00
Current Death Benefit	$141,749.74
Riders: Principal First	$115,000.00

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Investment Summary as of November 27, 2012

	Owner	Type	Company	Account #	Date	Deposits	WD's	12/31/2010	Curr Value	Holdings	P Bene	C Bene
8.	Mrs.	NQ	Fund Co			$10,000.00	$0.00	$9,395.42	$11,357.92		TOD Trust	
				12345	12/6/2004	$10,000.00		$9,395.42	$11,357.92	Fund		
	Dividends that were paid out 2005 Dividends $585.62 2006 Dividends $142.89											
	**Per Client's request changed account to Reinvest Dividends as of 4-01-2006											
9.	Joint	NQ	VA Co	12345		$30,845.85	$28,800.00	$13,486.07	$10,355.51		Trust	
					2/13/1998	$30,845.85		$1,895.40	$1,414.91	Funds		
					2004		$10,800.00	$2,978.73	$2,474.02	Funds		
					2005		$14,000.00	$2,016.98	$1,792.06	Funds		
					2006		$4,000.00	$4,396.55	$2,852.20	Funds		
								$2,198.41	$1,822.32	Funds		
	SWP $1,000/month began October 2005 *Client suspended wd's 2006* *Current Death Benefit $10,355.51*											
10.	Joint	NQ	VA Co	12345	5/5/2003	$60,766.22	$0.00	$83,272.13	$90,907.45		Trust	
								$21,141.30	$22,525.68	Funds		
								$21,760.68	$24,524.69	Funds		
								$20,403.47	$21,429.20	Funds		
								$19,966.68	$22,427.88	Funds		
	Current Death Benefit $90,907.45 *Riders: Enhanced Income Benefit, Traditional Death Benefit* *Currently at 3% surrender charge / 0% after 6 yrs*											
11.	Joint	NQ	VA Co	12345	5/2/2003	$59,936.11	$0.00	$81,891.63	$89,401.71		Trust	
								$20,775.91	$22,136.36	Funds		
								$21,412.06	$24,131.79	Funds		
								$20,059.34	$21,067.77	Funds		
								$19,644.32	$22,065.79	Funds		
	Current Death Benefit $89,401.71 *Riders: Enhanced Income Benefit, Traditional Death Benefit* *Currently at 3% surrender charge / 0% after 6 yrs*											

THE SILBERNAGEL GROUP INC.
Real Wealth Advisors

Mr. and Mrs. Client
Investment Summary as of November 27, 2012

	Owner	Type	Company	Account #	Date	Deposits	WD's	12/31/2010	Curr Value	Holdings	P Bene	C Bene
12.	Trust	NQ	Fund Co	12345		$100,000.00	$0.00	$78,616.52	$140,383.07			
					2/13/2004	$70,000.00		$78,616.52	$140,383.07	*Funds*		
					4/6/2006	$30,000.00						
13.	Joint	NQ	Fund Co			$14,000.00	$4,600.00	$0.00	$10,392.39			
	TOD Trust			12345	4/17/2006	$14,000.00		$0.00	$10,392.39	*Money Fund A*		
					4/3/2007		$1,100.00					
					7/31/2007		$3,500.00					
14.	Mr.	529	Fund Co	12345		$6,912.95	$0.00	$7,157.82	$8,162.50			
	FBO child name DOB 1/1/01				11/1/2004	$6,912.95		$7,157.82	$8,162.50	*Funds*		
15.	Mr.	529	Fund Co	12345		$5,450.50	$0.00	$5,821.65	$6,808.54			
	FBO child name DOB 1/1/01				11/1/2004	$5,450.50		$5,821.65	$6,808.54	*Funds*		

Total Value All Accounts:	$870,940.67
Total Value All Accts w/ Guar Death Benefits:	$718,946.08
Total Value All Accts w/ Living Benefits:	$822,096.95

Conducting the Meeting

Thank everyone for being available, on behalf of yourself and your clients.

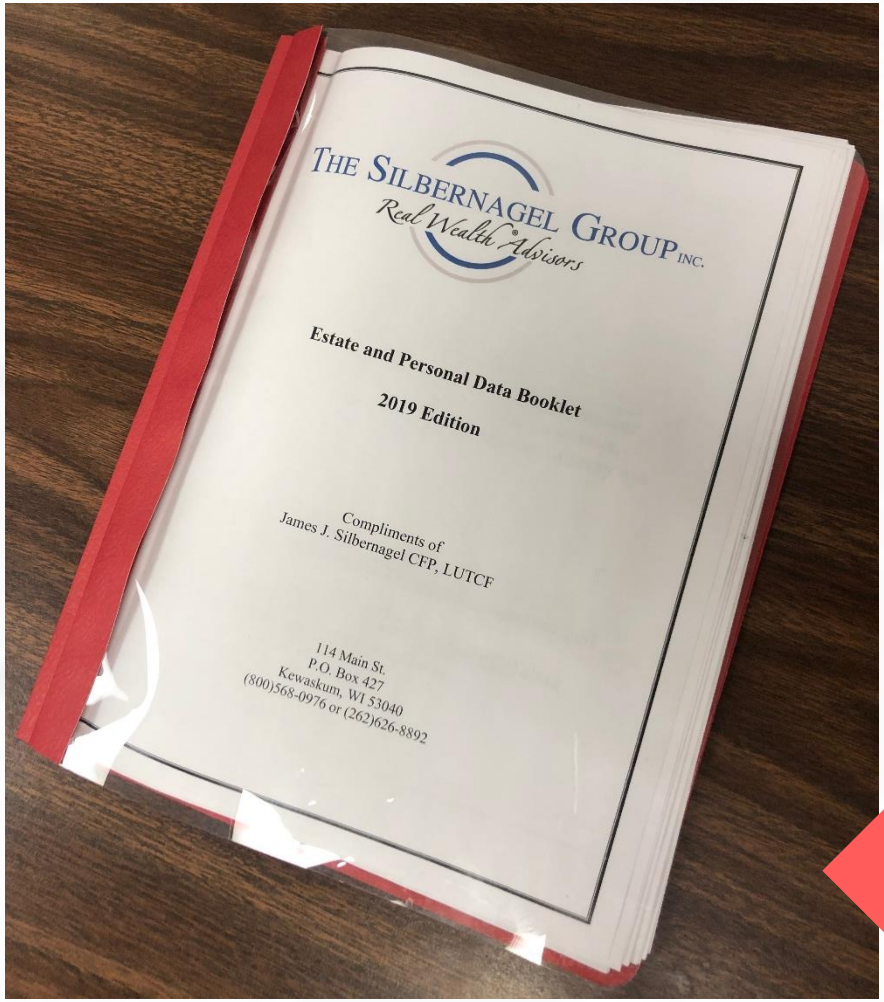
- Introduce yourself to kids
  - Give background info
- Why we are here
- What the kids' roles will be
  - My ulterior motive
- Review the plan
  - Estate, Financial, Insurance, LTC…
  - Stay within ground rules
  - Review kids' roles, and when

Concluding the Meeting

- Introduce everyone to *Real* Wealth® Weekly
- Collect email addresses
- Schedule appointments with kids who are ready to begin the planning process

Referral Potential

The Red Book
"The Owner's Manual"



The kids are your checks and balances:

Make sure the parents do their homework!

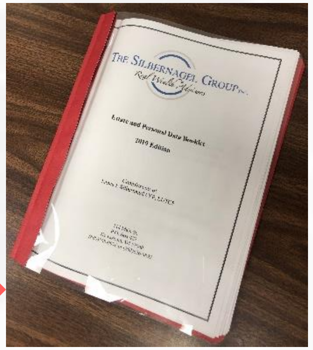
The Red Book
Estate & Personal Data Booklet

PART I: INSTRUCTIONS/THOUGHTS

PART II: CONFIDENTIAL DATA:

APPENDIX

The Red Book
Estate & Personal Data Booklet



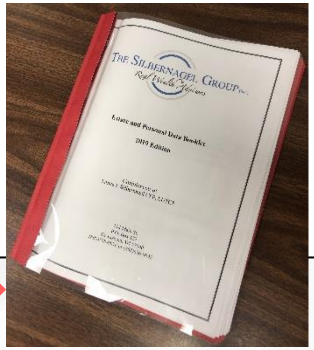
25 Suggested Topics to Discuss With Your Health Care Agent

Before having your health care agent sign any forms, you should discuss your beliefs and wishes with him or her. When instructing your health care agent about your wishes in the event you become incapacitated and they need to make health care decisions, we suggest you consider the following questions. We suggest no particular answers. Each person should answer these questions based on their own beliefs and convey those beliefs and wishes to their health care agent. Any other wishes or desires that you feel your health care agent should know should also be given to them so that they can carry out their responsibilities as you would wish.

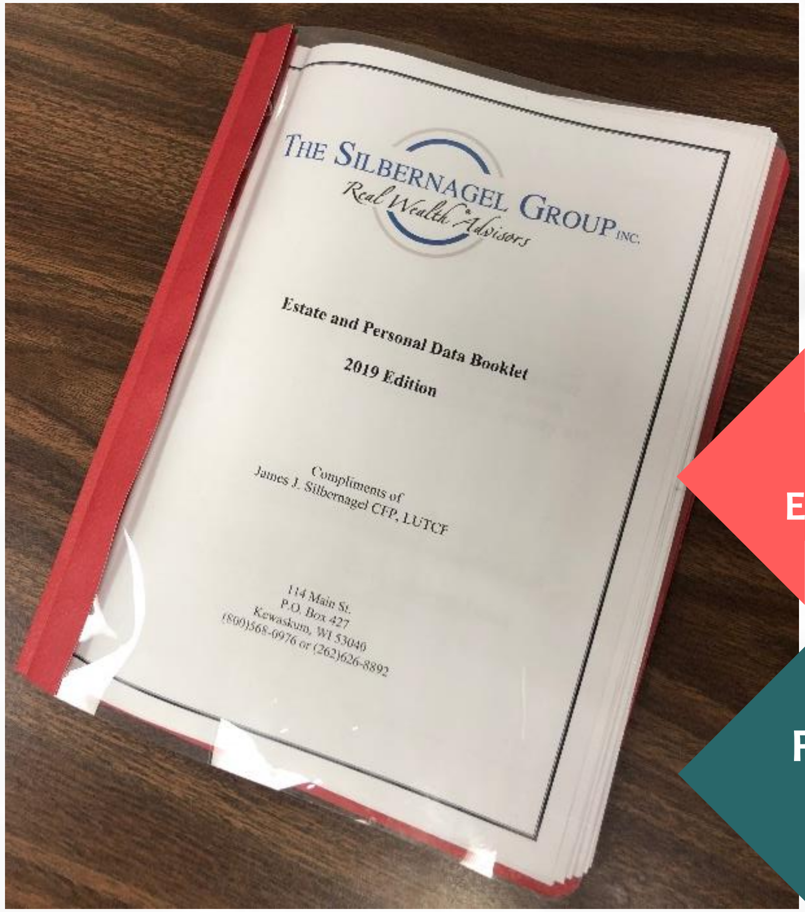
1. Do you think it is a good idea to sign a legal document that says what medical treatments you want and do not want when you are dying? (This is called a "living will.")
2. Do you think you would want to have any of the following medical treatments performed on you?
   a. Kidney dialysis (used if your kidneys stop working)
   b. Cardiopulmonary resuscitation, also called CPR (used if your heart stops beating)
   c. Respirator (used if you are unable to breathe on your own)
   d. Artificial nutrition (used if you are unable to eat food)
   e. Artificial hydration (used if you are unable to drink fluids)
3. Do you want to donate part of your body to someone else at the time of your death? (This is called "organ donation.")
4. How would you describe your current health status? If you currently have any medical problems, how would you describe them?
5. If you have current medical problems, in what ways, if any, do they affect your ability to function?
6. How do you feel about your current health status?
7. If you have a doctor, do you like him or her? Why?
8. Do you think your doctor should make the final decision about any medical treatments you might need?
9. How important is independence and self-sufficiency in your life?
10. If your physical and mental abilities decrease, how would that affect your attitude toward independence and self-sufficiency?
11. Do you wish to make any general comments about the value of independence and control in your life?
12. Do you expect that your friends, family and/or others will support your decisions regarding medical treatment you may need now or in the future?
13. What will be important to you when you are dying? (e.g., physical comfort, no pain, family members present, etc.?)
14. Where would you prefer to die?
15. What is your attitude toward death?
16. How do you feel about the use of life-sustaining measures in the face of terminal illness?
17. How do you feel about the use of life-sustaining measures in the face of permanent coma?
18. How do you feel about the use of life-sustaining measures in the face of irreversible chronic illness? (e.g., Alzheimer's disease?)
19. Do you wish to make any general comments about your attitude toward illness, dying, death?
20. What is your religious background?
21. How do your religious beliefs affect your attitude toward serious or terminal illness?
22. Does your attitude toward death find support in your religion?
23. How does your faith community, church, or synagogue view the role of prayer or religious sacraments in an illness?
24. Do you wish to make any general comments about your religious background and beliefs?
25. What else do you feel is important for your agent to know?

If, over time, your beliefs or attitudes in any area change, you should inform your health care agent. It is also wise to inform your health care agent of the status of your health when there are changes such as a new diagnosis. In the event you are informed of a terminal illness, this, as well as the ramifications of it, should be discussed with him or her. How well your health care agent performs depends on how well you have prepared them.

The Red Book
Estate & Personal Data Booklet



The Red Book
"The Owner's Manual"



The Red Book
Estate & Personal Data Booklet

Free for Premier Members!
$19.99 online

25 Suggested Topics to Discuss
With Your Health Care Agent

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2. Do you think you would want to have any of the following medical treatments
   ...is (used if your kidneys stop working)
   ...nary resuscitation, also called CPR (used if your heart sto...
   ...sed if you are unable to breathe on your own)
   ...ition (used if you are unable to eat food)
   e. Artificial hydration (used if you are unable to drink fluids)

3. Do you want to donate part of your body to someone else at the time of your death? (This is called "organ donation.")

4. ...cribe your current health status? If you currently have any medica... ...ld you describe them?

5. ...medical problems, in what ways, if any, do they affect your...

6. How do you feel about your current health status?

Section of The Red Book
25 Suggested Topics to Discuss

Free for everyone! Check your inbox for recap email

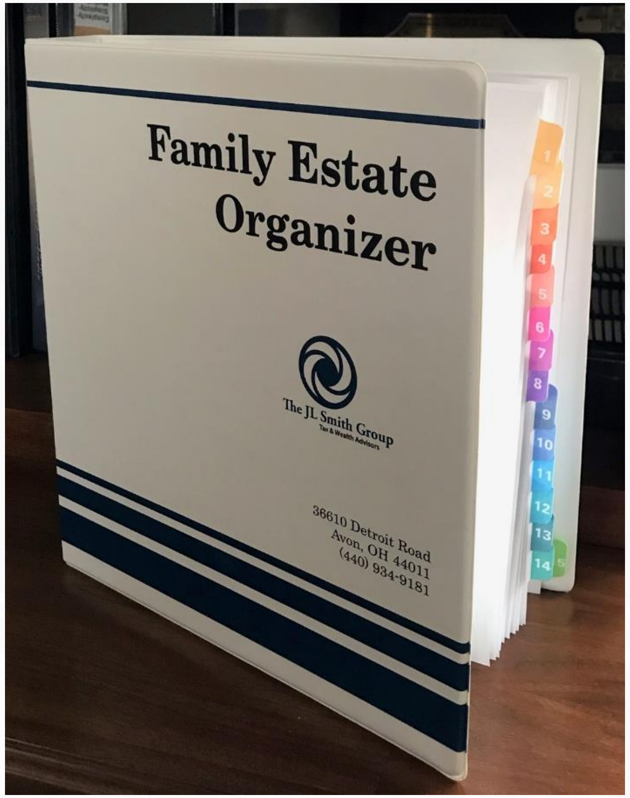
More Resources: The Grab & Go Binder

- Accessible at a moment's notice
- Consolidated in a single location
- What's included:
  - Living Wills, Powers of Attorney
  - Allergies, hospital preference, doctor, emergency contacts
  - CPA, financial advisor, insurance agents, attorney

More Resources: The Family Estate Organizer

CLARITY2 PROSPERITY
Processes. Training. Coaching.

- What's included:
  - Financial, legal, insurance, tax info
  - Asset sheet
  - Survivor's checklist
- Organized, single-point of truth
- Increases future and present sales opportunities
- Sells ancillary products
- Automatically gets the surviving client to you, not the attorney
- Creates referrals



More Resources: The Money Talk

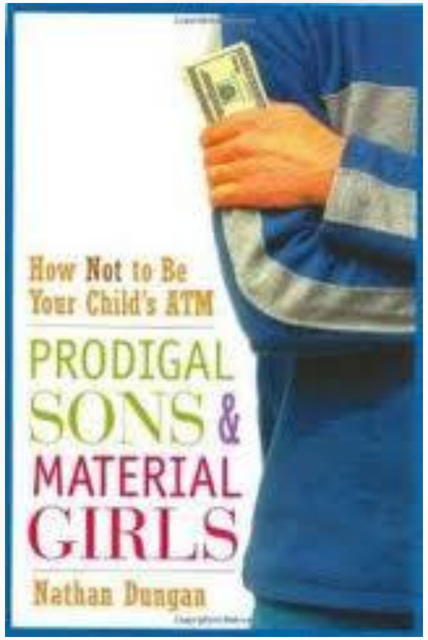
- Wealth Connection Cards – created with advisors in mind
- Learn how you & partner thinks, feels and acts around money
- Opens communication – needs AND wants
- Each deck includes advisor guide with tips & tools

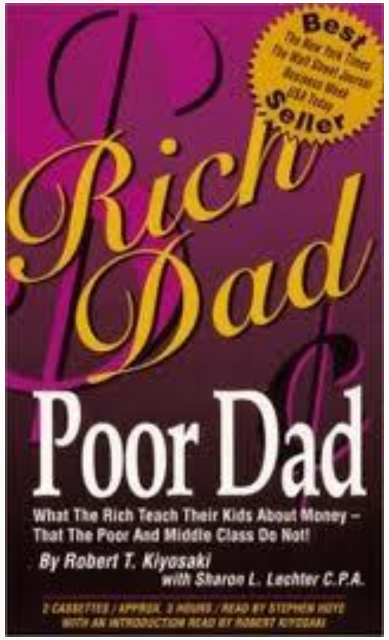
Breaking Money Silence®

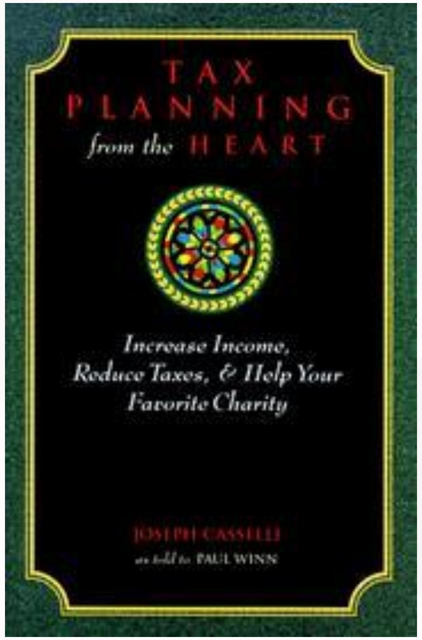
kbkwealth connection

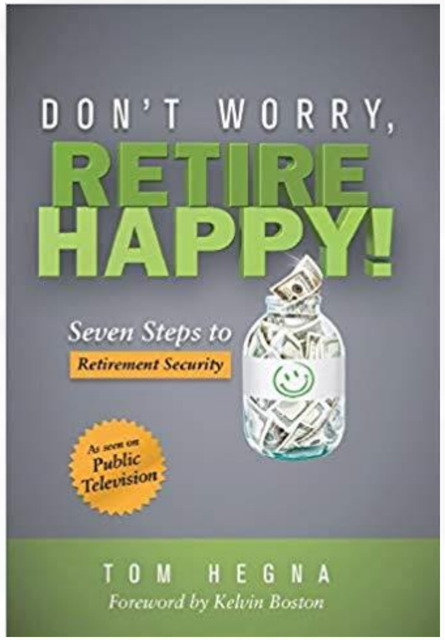
Other Key Differentiators

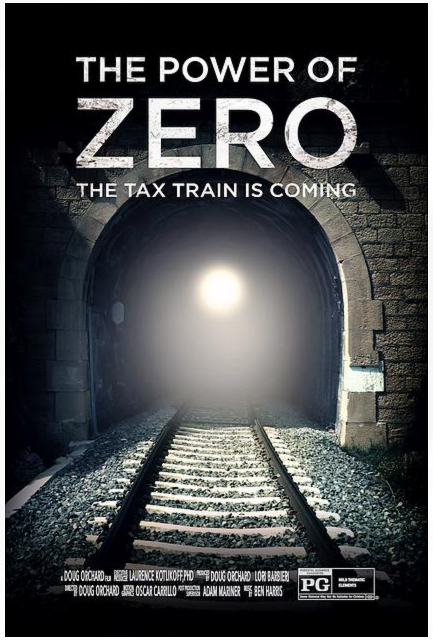
- Annual Reviews
- Impactful Books & Resources











Other Key Differentiators

- Annual Reviews
- Impactful Books & Resources
- *Real* Wealth® Weekly

RWM
Real Wealth® Marketing Productions

Angela Silbernagel
Director of Marketing

Part 1: FOR CONSUMERS

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WEEKLY
Educate, Inspire, Motivate

Part 2: FOR ADVISORS

Power Session LIVE
powered by Real Wealth

March 8th, 2019

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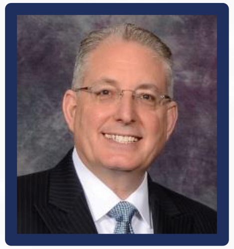
CONTENT MARKETING SYSTEM

Let experts like these tell your clients how badly they need you!



617 All Contacts	13 New Leads	1 Warm Lead	6 Hot Leads

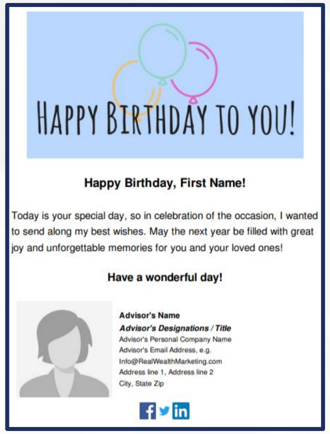

A SPECIAL NOTE TO SAY...
THANK YOU!

Dear First Name,

Thank you for another year of your business, your confidence and your loyalty. It is a pleasure and an honor to serve you in helping you to achieve your goals and protect what you care about most!

- Retirement
- Marital Status
- Changes in home or thinking of buying/selling any real estate properties
- Changes in auto and/or recreational vehicle
- Identity theft protection and repair
- Changes in business and/or farm
- Tax planning
- Children/grandschildren
- Employment (new job, promotion, raise, retirement, change in employer plans)
- Estate plan

Advisor's Name
Advisor's Designations / Title
Advisor's Personal Company Name
Advisor's Email Address, e.g.
Info@RealWealthMarketing.com
Address line 1, Address line 2
City, State Zip


HAPPY BIRTHDAY TO YOU!

Happy Birthday, First Name!

Today is your special day, so in celebration of the occasion, I wanted to send along my best wishes. May the next year be filled with great joy and unforgettable memories for you and your loved ones!

Have a wonderful day!

Advisor's Name
Advisor's Designations / Title
Advisor's Personal Company Name
Advisor's Email Address, e.g.
Info@RealWealthMarketing.com
Address line 1, Address line 2
City, State Zip


Happy Anniversary

Happy Anniversary!

Congratulations on another year together.

Enjoy some time looking back on all your wonderful memories.

We wish you many more happy years to come.

Cheers!

Advisor's Name
Advisor's Designations / Title
Advisor's Personal Company Name
Advisor's Email Address, e.g.
Info@RealWealthMarketing.com
Address line 1, Address line 2
City, State Zip

"*Real* Wealth® gets my client engaged, educated, and ready to move."

-Heather Lindsley,
Green Bay, WI

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COMPLIANCE APPROVED

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ARP Advisor LLC*
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Brokers International Financial Services
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Cambridge Investment Research
Cetera*
CFD Investments
Country Financial*
CPS Horizon Financial*
Erie Family Life Insurance Company*
Farm Bureau*
Farmers Financial Solutions*
First Heartland
Foresters Equity*
FSC Securities Corporation
G.A. Repple
Gradient Advisors, LLC*
Harbour Investments*
HD Vest*
Intercarolina Financial Services*
Joliffe Capital*
JW Cole*
Kingsview Asset Management*
Knights of Columbus*
Lafayette Life*
Lincoln Financial*
Lion Street Financial
LPL Financial*
Mass Mutual*
M Holdings Securities
Mid-Atlantic Brokers*
Midland National Life*
Mutual of Omaha*
National Life Group*
New York Life*
NEXT Financial
Ohio National Life*
OneAmerica*
ONESCO
Onesta*
Parkland Securities LLC*
Principal Financial Group*
Private Client Services*
Prosperity Capital Advisors
Prudential*
Questar Capital
Royal Alliance Associates
Royal Fund Management, LLC*
SagePoint Financial Services
Securian Financial Group*
Securities America*
Signator Investors, Inc.
State Farm*
Strategic Financial Alliance
Summit Brokerage Services, Inc.*
TF Wealth Management*
The Leaders Group
Thrivent*
Transamerica*
Triad Advisors Inc.*
Voya Financial
Woodbury Financial Services
World Equity Group*

Features Include:

- Personalized email and social media campaigns
- Fully automated distribution for email, Facebook, Twitter & LinkedIn
- Full analytics
- Lead scoring technology
- Interest-specific lists of prospects
- Automatic birthday, anniversary and annual review campaigns
- Personal Marketing Consultations with Advisor Success Coach
- Personally branded webpage
- **NEW! Holiday campaigns**
- **NEW! Custom subscribe option**
- **NEW! Podcast widget to increase SEO**
- **NEW! Lead notification system**
- **NEW! Bonus prospecting ideas**

NEW! RedTail integration

REDTAIL

The Value of the Setup Fee

Not to mention the value of your Membership Benefits!

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Advisor Success Coach
Educate, Inspire, Motivate

- **One-on-one Marketing Consultation** with experienced Advisor Success Coach
- **Personalized recommendations** for your marketing strategy & goals
- **Professional implementation** of the *Real* Wealth® program and marketing materials:
  - *Connect Social Media platforms*
  - *Add content to your existing website for maximized SEO*
  - *Organize and upload your contact list*
  - *Brand your email templates*
  - *Compliance approval assistance*
  - *Launch marketing campaign(s)*
  - *Send announcement/introduction email*
- **Training for you and your team:**
  - *How to create/send additional emails & social posts*
  - *Read & understand analytics*
  - *Script training to turn your warm & hot leads into clients*
  - *Utilizing custom fields*
  - *How to grow and maintain your list*

Fill out the survey!

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Van Mueller, LUTCF

26x MDRT Top of the Table Advisor

Friday, April 12th

March 8th, 2019

Power Session **LIVE**
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Q&A with Van Mueller

Type in your questions! We'll get to as many as we can.

Watch your inbox for the recap email loaded with resources including:

- Free download: 25 topics to discuss
- Download the entire Red Book: $19.99 or free for Premier Members

Use code **FETA** for $200 off registration!

RealWealthMarketing.com/Symposium

See you next month:
Power Session LIVE
powered by Real Wealth

Become a Questions Master

Van Mueller, LUTCF

26x MDRT Top of the Table Advisor

Friday, April 12th