



UNLOCK YOUR VIRTUAL POTENTIAL



Featuring: **Max Schmitz**

November 2023 bd-eh-coi-a-1432-11-2023

For Broker Dealer / RIA /

Financial Professional use only.

(262) 626-2590

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ON NEXT MONTH'S POWER SESSION LIVE

Dave Alison, *Executive Vice President and
Founding Partner of Clarity 2 Prosperity
Mastermind Group*



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BACK OFFICE TAX SERVICES NOW OFFERED

- Back office tax service for financial professionals
- Letter of recommendation from a CPA + option for additional consulting
- Tax planning, not just tax preparation



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LET US DO YOUR BOOKKEEPING



RWTax.net/accounting-pricing/

Basic

- Bookkeeping for less than 100 transactions per month
- Bank reconciliation
- Monthly financial statements (P&L, balance sheet, cashflow, 1099s)

\$150/mo

Standard

- Bookkeeping for 100-300 transactions per month
- Bank reconciliation
- Monthly financial statements (P&L, balance sheet, cashflow, 1099s)

\$250/mo

Premium

- Bookkeeping for 301 or more transactions per month
- Bank reconciliation
- Monthly financial statements (P&L, balance sheet, cashflow, 1099s)

*\$350/mo+

*Pricing for this tier starts at \$350/mo for 301-500 transactions. Every additional 200 transactions adds \$100/mo



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LEARN MORE ABOUT REAL WEALTH



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Jose Rodriguez Jr

“I really enjoyed today’s presentation. Thank you all, *Real Wealth®* is the best.”

Roger Relfe

“I have 3 businesses who need to work on next generation succession now!!”

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“Today’s speaker really spoke to Me! I am already forming my Top 3 for this year!”

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Market Analysis

- Benefits and opportunities of starting a virtual insurance agency

- Target customers and their

specific needs Target

audience and purpose

Considerations for Building a VIA

- Choosing a niche
- Building a business plan and financial projections
- Establishing legal and operational structures
- Selecting technology platforms and tools for your agency

Developing a Product Menu

- Affiliate marketing vs. Broker of record
- Working with carriers and wholesalers
- Policy administration and documentation process
- Managing underwriting and claims processes efficiently

Building an Online Presence

- Designing a professional and user-friendly website
- Utilizing search engine optimization (SEO) techniques
- Leveraging social media and digital marketing strategies
- Creating compelling content to educate and engage customers

Customer Acquisition and Retention

- Implementing effective lead generation strategies
- Building customer trust and credibility online
- Providing exceptional customer service and support
- Implementing retention strategies to increase customer lifetime value

Leveraging Data and Analytics

- Collecting and analyzing customer data
- Utilizing data-driven insights for personalized marketing
- Using analytics to optimize pricing and profitability

Risk Management, Scalability, and Beyond

- Managing compliance, risk management, and data protection
- Strategies for scaling and expanding your agency
- Evaluating exit options and preparing for a potential sale

Virtually Done

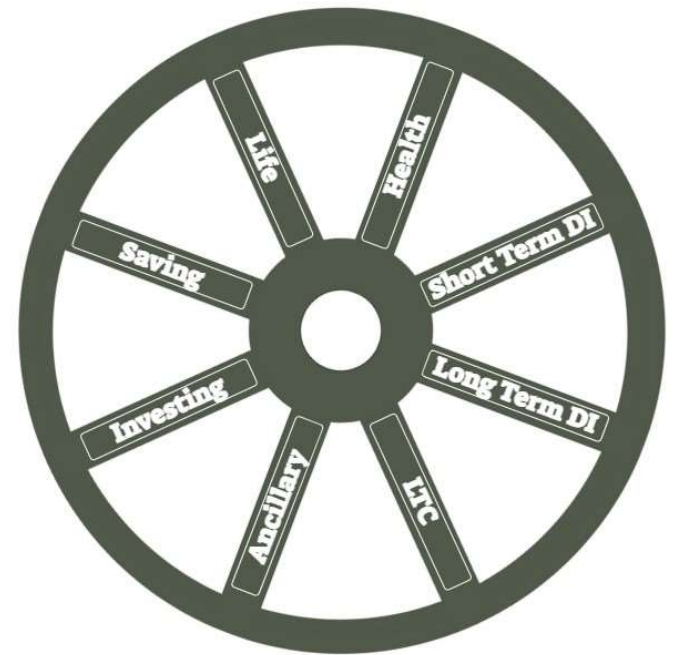
- This is doable today
- Consider the implications for your business
- Consider the implications for your clients

WAGONWHEELWAY

We understand the importance of protecting your family's future.

WWW is a hub-and-spoke model to help you access the very best suite of family benefit solutions that are 100% DIY.

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Questions?

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- [linkedin.com/in/maxwellschmitz](https://www.linkedin.com/in/maxwellschmitz)





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QUESTION & ANSWER

Type in your questions now!

Don't forget to register
for these *every month!*

Second Friday @ 10:30 am CST



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