

Grow Your Business

Financial Professionals Recruiting Pre-built Campaign

Instructions

1. Set up your webinar

Use your calendar system to set up webinar invite

- **Topic title:** Policy Review Training
- **Webinar description:** Learn the basics of how to do a policy review
- **Note:** Don't forget to include your online meeting information

2. Promote your webinar

Use our simple copy and paste content to promote your webinar for three weeks. Include the webinar link in all the promotions

Choose one or more of the following:

- **eNewsletter posts**
- **Email** (tip - send same email a 2nd time to non openers with a new subject line)
- **Social media posts** (tip – If you are having trouble posting opened images on LinkedIn, clear your cache and log back in. LinkedIn stores old links indefinitely)

3. Have a successful webinar!

Conduct training webinar during week four. And don't forget to follow up with one or more additional promotions.



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WEEK ONE

ENEWSLETTER

Not your parent's life insurance

Today's clients are more dynamic and diverse than ever before. Watch this short video to find out why [Generation Matters](#).

**Reminder – add in your webinar link. Nikki edit this blurb as you see fit*

EMAIL

Save time with ready-to-go prospecting.

**promote upcoming webinar*

164 Million don't have insurance & **over 60 Million** are underinsured.

HELLO OPPORTUNITY!

Your clients need life insurance coverage. Almost half of American households have no life insurance coverage, and over 60 million households that do have coverage feel they are underinsured.

Sales potential for the underinsured life insurance market is \$12 billion dollars and growing, and \$30 billion per year.¹

Just how big is the market opportunity? [View the statistics](#)

Meet your book of business and grab your wallet share! [Client profile worksheet](#)

Contact: 800-800-0000
nsp@company.com

YOUR LOGO

SOCIAL MEDIA

LINKED IN

86% of [#GenXers](#) are concerned about Social Security. Supplement [#retirement](#) with life insurance you use while living .
<https://bit.ly/2C6AyD3>

FACEBOOK

RETIREMENT ASSETS

6x ANNUAL SALARY
Amount needed by age 50 to be financially ready to retire by 67²

86% OF GEN XERS are concerned Social Security will not be available at retirement

Sources: Fidelity Viewpoints: How much do I need to save for retirement? June 2017
Sources: Transamerica Center for Retirement Studies: 17th Annual Transamerica Retirement Survey: A Compendium of Findings About American Workers, 2016 (1,232 surveyed)

TWITTER

86% of Gen Xers are concerned Social Security will not be available at retirement. Explore [options](#) on how you can supplement retirement with life insurance you use while living
<https://bit.ly/2C6AyD3>



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WEEK TWO

ENEWSLETTER

Help Leave a legacy
Things change. Help clients review their current beneficiary designations to make sure client data is up to date. This [Beneficiary Review Guide](#) can help get the conversation started.

***promote upcoming webinar**

EMAIL

Journey to financial fitness

***promote upcoming webinar**



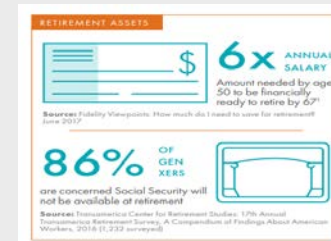
But what about financial fitness? Helping your clients' financial future begins with identifying and prioritizing their needs and dreams. By mapping out and preparing for their financial future, you can help them spend less time worrying about uncertainty and...
Help create a personal plan with this [Financial Fitness Checklist](#). Contact me to learn more about more about how financial fitness can be an important part of a healthy plan.
• Set financial goals
• Develop a plan
• Take action on the plan
• Take action on the plan
AIG Contact: 800.800.0000 name@yourcompany.com YOUR LOGO

SOCIAL MEDIA

LINKED IN

6X annual salary needed by 50 to be [#retirement](#) ready by 67. Learn more about options to build your financial future.
<https://bit.ly/2C6AyD3>

FACEBOOK



TWITTER

6X annual salary needed by 50 to be [#retirement](#) ready by 67. Learn more about options to build your financial future.
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Financial Professionals Recruiting Pre-built Campaign

WEEK THREE

ENEWSLETTER

Preparing for your clients' financial future begins with identifying and prioritizing their needs and dreams. By mapping out and preparing for their financial future, you can help them spend less time worrying about uncertainty. Use this [Financial Fitness Workbook](#) to help your clients get started.

**promote upcoming webinar*

EMAIL

Life doesn't stand still

**promote upcoming webinar*

LIFE DOESN'T STAND STILL
Neither should your client's life insurance coverage

Any client can and should benefit from a policy review every three to five years as well as following any major lifestyle change.

Why is a policy review important?

If your clients' needs or plans have changed, then their policy may need to be adjusted to fit their new circumstances. Changes in life are quite different today than when your clients purchased their policy, and likely so are their insurance needs. A systematic policy review is the best way to ensure their coverage continues to keep pace with their needs.

Use this complimentary [Policy Review Toolkit](#) to learn how to create opportunities, through policy reviews and contact me to find out about additional available resources.

Contact: 800-000-0000
name@company.com

SOCIAL MEDIA

LINKED IN

Older Millennials may need \$1.8M to maintain standard of living in retirement? Too early to plan? It's easier than you think.
<https://bit.ly/2IVHPeB>

FACEBOOK

WHEN IS THE RIGHT TIME?

\$1.8 MILLION
Amount Older Millennials (born in the early 1980s) will need to maintain their standard of living in retirement.
Source: USA Today: Millennials' new retirement number? \$1.8 million (or more), 2016.

34% ANNUALLY
Amount of income a 25-year-old waiting until they turn 35 to begin saving for retirement will need to save in order to retire at age 67?
Source: Nord Walter: Millennials May Have to Save 22% of Yearly Income for Retirement if Market Returns Drop, 2016.

TWITTER

Older Millennials may need \$1.8M to maintain standard of living in retirement? Too early to plan? It's easier than you think.
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WEEK FOUR

Webinar week and promotional followup





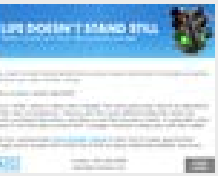



Webinar topic: Policy Review Training

Congratulations! You've been promoting the webinar you set up in week one. Good luck with your presentation, and don't forget to follow up with these promotions:

ENEWSLETTER	EMAIL	SOCIAL MEDIA		
		LINKED IN	FACEBOOK	TWITTER
<p>Pitch Perfect Get targeted life insurance options for clients by simply inputting their age and answering a few questions about their life stage; Generation Station will then deliver a personalized pitch for your next client meeting.</p> <p>*promote upcoming webinar</p>	<p>What's new in your clients' life? *promote upcoming webinar</p> 	<p>73% of people 18-36 think life insurance is too expensive but overestimate cost by 3x. Find out options for you. https://bit.ly/2tOFI7z</p>	 <p>AFFORDABILITY</p> <p>A latte costs \$4/DAY</p> <p>Life insurance costs as little as \$1/DAY*</p> <p>73% PEOPLE AGES 18-36 think life insurance is too expensive but they overestimate its true cost by MORE THAN 3x</p> <p>Sources: LifeHappens.org/TrueCost, Accessed 2017 Sources: LIMRA, 2017 Insurance Barometer Study (2,031 surveyed)</p>	<p>73% of people 18-36 think life insurance is too expensive but overestimate cost by 3x. Find out options for you. https://bit.ly/2tOFI7z</p>



Full Campaign at a Glance: Grow Your Business

ENEWSLETTER	EMAIL	SOCIAL MEDIA		
		LINKED IN	FACEBOOK	TWITTER
WEEK ONE: add webinar link to promotions				
<p>Not your parent's life insurance Today's clients are more dynamic and diverse than ever before. Watch this short video to find out why Generation Matters.</p>	<p>Save time with ready-to-go prospecting.</p> 	<p>86% of Gen Xers are concerned Social Security will not be available at retirement. Explore options on how you can supplement retirement with life insurance you use while living http://spr.ly/6006ByPP4</p>		<p>86% of Gen Xers are concerned Social Security will not be available at retirement. Explore options on how you can supplement retirement with life insurance you use while living http://spr.ly/6006ByPP4</p>
WEEK TWO: add webinar link to promotions				
<p>Help Leave a legacy Things change. Help clients review their current beneficiary designations to make sure client data is up to date. This Beneficiary Review Guide can help get the conversation started.</p>	<p>Journey to financial fitness</p> 	<p>6X annual salary needed by 50 to be #retirement ready by 67. Learn more about options to build your financial future. http://spr.ly/6006ByPP4</p>		<p>6X annual salary needed by 50 to be #retirement ready by 67. Learn more about options to build your financial future. http://spr.ly/6006ByPP4</p>
WEEK THREE: add webinar link to promotions				
<p>Preparing for your clients' financial future begins with identifying and prioritizing their needs and dreams. By mapping out and preparing for their financial future, you can help them spend less time worrying about uncertainty. Use this Financial Fitness Workbook to help your clients get started.</p>	<p>Life doesn't stand still</p> 	<p>74% of #Millennials don't think they'll have Social Security. Some life insurance can supplement #retirement. https://bit.ly/2IVHPeB</p>		<p>Older Millennials may need \$1.8M to maintain standard of living in retirement? Too early to plan? It's easier than you think. https://bit.ly/2IVHPeB</p>
WEEK FOUR: Deploy Scheduled Webinar for Lead Generation				
<p>Pitch Perfect Get targeted life insurance options for clients by simply inputting their age and answering a few questions about their life stage; Generation Station will then deliver a personalized pitch for your next client meeting.</p>	<p>What's new in your clients' life?</p> 	<p>73% of people 18-36 think life insurance is too expensive but overestimate cost by 3x. Find out options for you. https://bit.ly/2tOFI7z</p>		<p>73% of people 18-36 think life insurance is too expensive but overestimate cost by 3x. Find out options for you. https://bit.ly/2tOFI7z</p>

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