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## A Brief How-To Guide with SafeMoney.com Advisor Materials

Welcome to the SafeMoney.com advisor community and Client Education Program! We're glad to have you. In this booklet, you will learn some fundamental strategies to get the most out of your SafeMoney.com program subscription, including your Advisor Referral Listing and your Client Marketing Materials.

While these ideas are by no means exhaustive, they are a good starting point.

**Please note, while we encourage you to share the articles on SafeMoney.com with consumers, we ask that you not copy and paste these articles anywhere else online.** Our writing team has worked hard to make sure they are completely unique. Search engines like Google put websites with unique content on a higher pedestal than websites with duplicate content. Therefore, our team strives to preserve their uniqueness, so SafeMoney.com can get the best traction possible from Google and other search engines. Our goal is to help you and other listed advisors by aiming for the best search results possible.

Now, read on for some helpful tips on putting your SafeMoney.com materials to work for you.

### **Setup a Referring Domain to Your Listing Address, Then Put that Domain on Business Cards and Flyers**

Many advisors and agents belong to community organizations. This can be for a variety of reasons:

- Expanding network by relationship-building with community & business leaders
- Joining and being active in organizations that fit your target client profile
- Engaging in community support or outreach programs to give back and bolster the social profile of your firm

These community involvement activities are events which provide opportunities for networking and relationship-building. As you meet new people, you may pass



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out cards, flyers, or other business reference materials that are appropriate for the event. Those times when you pass out business cards or other hand-out materials are prime opportunities for spreading the word about your specialty as a Safe Money Expert.

First things first, with your Advisor Referral Listing. Consider getting a domain that has the "financial safety" theme of safe money and then having that domain redirect to your listing page. Domains often can be bought at low cost. One place that domains can be bought is at [GoDaddy.com](http://GoDaddy.com).

Once you have the domain redirecting to the listing, put that domain name on business cards and other handout materials. Include a powerful call to action besides the usual "call for a free financial consultation." Everyone else is offering invitations to "personal consultations," so consider different, value-infused calls to action so you stand out.

Examples may include:

- "Schedule a no-cost, personal goal-discovery call!"
- "Request a no-obligation strategy session to discuss your needs and situation."
- "Visit this site to setup a personal goal-setting appointment!"
- "Come and discover the difference that personal guidance can make."
- "Setup a meeting so we can discuss ways for you to enjoy a predictable, financially comfortable lifestyle!"

Include the domain address next to the call to action so it's clear that is where they go to setup an appointment.

If you have a specific business audience you're working with – say business owners, for example – you may consider a call to action that speaks to them. For example, a call to action for you to discuss business continuity strategies or something of that nature. If you have more than one business audience segment you are serving, consider developing separate pass-out and consumer outreach materials that are customized to each segment.



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## **Integrate Safe Money into Your Marketing and Client Conversations**

If you aren't already, start using the concept of "Safe Money," or the money your clients need come hell or high water, in marketing and client conversations. In the 3<sup>rd</sup> Annual Guaranteed Lifetime Income Study:

- 81% of Americans, aged 55-75, said investors age 50 and over need strategies "to prevent significant portfolio losses."
- Likewise, 61% saw strong value in having guaranteed income to supplement Social Security payments.
- Despite that, only 3 in 10 Americans have had their advisors discuss guaranteed income strategies with them.
- But when you do discuss guaranteed income strategies with investors, those investors become 300% more likely to purchase a guaranteed income product.

So, today's generation of retired and to-be-retiring Americans value safety, principal protection, and guarantees in their retirement plan. As the "money you can't afford to lose," Safe Money is an easy-to-understand way to spark those conversations about putting financial safeguards and guarantees into your clients' financial picture.

This is where it's optimal to integrate SafeMoney.com and your consumer materials as a Consumer Education Program.

### **Firmly Brand Yourself as a Safe Money Expert**

In your marketing, website, seminar presentations, and other consumer materials, use your SafeMoney.com branding. Include the SafeMoney.com logo in your retirement seminar presentations, brochures, flyers, and other materials.

On your website, prominently display the SafeMoney.com logo and link back to your Advisor Referral Listing. We suggest putting it on your homepage or another page where consumers are actively visiting. Explain how it means you are a specialist in safe retirement financial strategies and how you are part of a community of advisors who advocate clear, transparent consumer education.



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You have an association with a nationally respected source for non-biased retirement planning information and advice.

You may also consider linking to key articles on SafeMoney.com on your website. We recommend you start by perusing the library of articles provided to you in your subscription kit. Remember, your website should be a central hub for communicating the specialty of your financial practice. It should also provide valuable, regularly-updated information to consumers. After all, your website is far more than just a calling card.

### **Re-Engage Client and Prospect Leads in Your Firm Database**

Look for opportunities to re-engage client and prospect contacts in your database. Retirement planning isn't just a one-time event but a moving target. Your clients may have new financial needs or goals that they didn't have when you first helped them find the right guaranteed retirement strategies. You may want to consider reconnecting with clients in your book of business who haven't been helped for some time, say 5 years or longer. If you have continued to do policy reviews and financial check-ups with those clients each year, all the better.

Consider sending them an email about a new educational resource that is available to them, SafeMoney.com, and encourage them to check it out. Use the website as a conversation starter about safe money and to move towards an in-person meeting, where you can determine whether your clients have any new needs with which to help.

In those appointments, identify possible new needs and fears that your clients may harbor. SafeMoney.com has a complete library of articles for you to share about different areas of retirement planning. Share the specific articles that speak to your clients' needs and that can help them make informed decisions about new insurance strategies.

Another prime opportunity is with prospects in your database. For whatever reason, they may not have done business with you. Now you have a new set of tools to educate them, build credibility, and earn their trust.

Email prospects in your database inviting them to visit SafeMoney.com, explain that you're part of a community of advisors on there who believe in clear



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consumer financial education, and that this resource has lots of information speaking to important parts of their retirement future. There are no costs or subscriptions required for consumers to access this information.

If you steer prospects and consumers to SafeMoney.com, you are taking advantage of this resource as a third-party referral. We have seen that consumers can have a different perception of their advisors once they learn their advisors are associated with SafeMoney.com. For example, some investors have given up a “Safe Money Expert” they were working within their state of residence for an advisor listed on our site, *in another state*. It was because these investors understood the commitment to education and consumer well-being that SafeMoney.com advocates.

We have included an email template in your Consumer Education Materials to use with prospects within your database. You may also tailor this email for specific segments of your prospective customers or even for your existing clientele.

Your clear association with SafeMoney.com in these communications is beneficial in a number of ways:

- You are clearly identifying yourself as an expert in safe financial strategies, or the “money you can’t afford to lose” portion of a retirement portfolio. This communicates a clear specialty in safe growth, capital preservation, wealth protection, and income strategies – which provides a clear value statement to consumers.
- If you have insurance business in other markets, such as health or P&C, you can start building out other sides of your insurance business with Safe Money. Or say your existing marketing programs focus heavily on annuity or life products, their advantages, and their benefits. Association with SafeMoney.com helps to round out your business profile as a retirement planning specialist.

### **Share SafeMoney.com Educational Articles on Your Social Channels**

Facebook, LinkedIn, and other social media platforms are an excellent way to connect with consumers. If you haven’t yet, we encourage you to look into these



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programs. More and more consumers are turning to social media platforms as part of their research into businesses they are considering. Your involvement on social media platforms provides a valuable opportunity to build an online following, harvest new leads, educate retirement investors, and cultivate credibility.

With your library of SafeMoney.com articles provided to you, as well as other SafeMoney.com articles that will be published, you have a great source for information. SafeMoney.com provides articles and insights you can share on retirement planning fundamentals, the importance of switching from an investment to an income mindset in retirement, income planning and capital preservation, ways to manage risk, and much more.

Facebook and LinkedIn are arguably among the most important social platforms for advisors. Consumers are active on Facebook, and it's one platform that is more conducive to capturing consumer attention. LinkedIn is a platform for networking among professionals and business owners, who are likely to be good candidates for your retirement planning services.

Share links to articles from SafeMoney.com on these platforms, and include a brief blurb as to why these articles are relevant for readers. It's another point of engaging with consumers and reminding them of your specialty in safe, low-risk financial strategies. The more articles – and educational content in general – you share over time, the more you'll cement how people see you as a retirement educator and consumer advocate.

### **Counter Negative Messaging in Financial Media with Educational Materials**

The financial press has published many negative articles on annuities and life products. But they are not experts on these retirement and insurance solutions, you are. SafeMoney.com is a publishing source on guaranteed insurance strategies and how they can help people enjoy financial security, as well as peace of mind. So, when you come across consumers who are skeptical of life and annuity products, use this resource to help them understand these products' merits.



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You may wonder how to judge situations in which it is advantageous to share these resources among annuity and life skeptics. A simple rule of thumb is this: Look for openings where your prospects indicate they are open-minded to content about annuities or life strategies. These can be when consumers say things along these lines: “I need to do my own homework,” “I haven’t researched these products personally, but I need to,” or “I’ve heard lots of bad things about annuities in the news, but don’t know if that’s completely accurate.”

Those could be opportunities to share your consumer guides and other helpful articles with them. Don’t forget, you can request specific article topics to be published on SafeMoney.com, just shoot us an email at [brent@safemoney.com](mailto:brent@safemoney.com).

### **Closing Thoughts**

We hope you find these fundamental strategies to be helpful. As your relationship with SafeMoney.com progresses, more strategies, tools, and resources will become available. The business opportunity for Safe Money practitioners is huge. Use these resources to educate your clients, separate yourself from other advisors as a Safe Money Expert, and watch your business grow.

**Want Personalized Ideas or Ready to Build a Campaign around Safe Money?  
Get in touch with Safe Money Broadcasting to start. Call us at (305)  
680-0940 to start on the road toward explosive business growth!**