Marketing Programs

Marketing Programs at a Glance

As our partner, our goal is to support you and help you grow your business. We've developed a comprehensive suite of programs, so marketing your business doesn't have to be a challenge. Our programs are custom-tailored to meet your needs so you can build your brand, attract new prospects, manage your digital presence, and so much more!

Advanced Markets:

From Social Security strategies to tax law reform, our goal is to help you build customized solutions for your client's retirement by incorporating advanced strategies that meet your unique client needs in easy-to-understand and deliverable terms. Our experienced team offers advanced retirement planning support, education, and training.

Agents in the News:

A media placement program that puts you on the local news to discuss trending topics. You'll be recognized as your area's go-to financial professional when you regularly appear in local media segments discussing timely financial topics. You'll receive all the necessary tools to make your media appearances successful.

Engage:

Prospecting in-person can be a challenge. Engage harnesses the digital prospecting power of LinkedIn to reach out to your target audience, and then automatically starts up a conversation directly with those prospects that are interested in connecting with you. Engage does the prospecting. You close.

Estate Plan Navigator:

Grow your service offerings and become a more holistic financial professional by leveraging this estate planning tool. Strengthen your client relationships by building a comprehensive, attorney-approved estate plan. Connect with a bar-licensed, in-state attorney directly in the tool when developing simple or complex estate plans.

FMG Suite:

Boost your digital presence with FMG Suite, an industry-leading digital marketing platform tailored to financial professionals. Build a modern and responsive lead-generating website, deploy targeted email campaigns, and manage your social media profiles within a single platform.

JourneyGuide:

An online, comprehensive retirement planning software designed to help your clients to and through retirement. This easy-to-use tool can help you prepare your clients for retirement by offering interactive planning in real-time and visibly demonstrating the impact of guaranteed income streams. The comprehensive dashboard also allows you to compare plans and monetize client relationships.

Life Policy Review Kit:

Conducting regular policy reviews can provide your clients with a valuable services and potentially help you discover new sales opportunities. Our life policy review kit is a great way to nurture current client relationships with customizable materials. Kit includes: a guide, customizable client and prospect letters, sample phone scripts, and policy review form.

RA Marketing:

Equip yourself with consistent, proven, and scalable lead generation and marketing programs. Start filling your sales funnel with qualified prospects by hosting live in-person seminars or virtual webinars. Build your brand reputation and digital footprint with credibility marketing. Increase your closing rate by automating your prospecting efforts with video, voice, email, and text follow-ups.

TakeOne Video:

Grab the spotlight with a professionally made video—featuring you. Videos are created using compliance approved scripts and are perfect for a host of marketing channels, including your website, social media, email campaigns, and even in your office entry or waiting room.

WOMAN Program:

As a woman in the financial services industry, the WOMAN Program provides an opportunity to learn, share, connect, and network with your peers to help you grow personally and achieve greater success professionally. Qualify for our WOMAN Elite program and start receiving a monthly Elite Dashboard to track your level and production, receive annual awards, recognition, and more!

Call us today at <XXX.XXX.XXXX> or learn more at <website.com>.