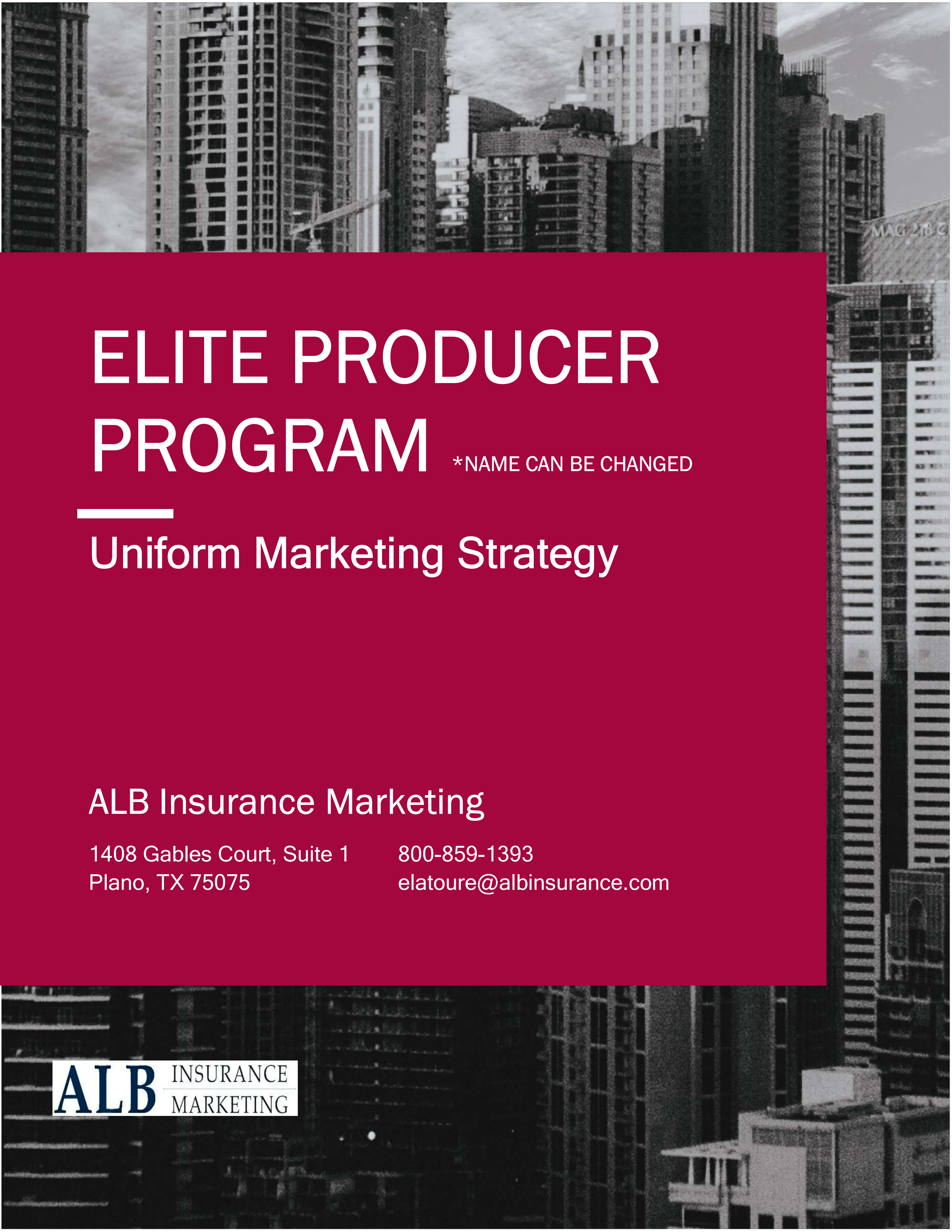

ELITE PRODUCER PROGRAM *NAME CAN BE CHANGED

Uniform Marketing Strategy

ALB Insurance Marketing

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Elite Producer Program

Mission Statement

This program is designed to bring in top producers with a value-add program that will support their business and be a recruiting tool for top-tier agents. The program is a comprehensive system to find new clients, organize their clients and prospects, effectively and efficiently market to the clients/prospects, retain business, optimize leads and provide new systems like virtual seminars to expand their outreach.

COMPONENTS OF THE ELITE PRODUCER PROGRAM

1. AdvisorRPM Elite Lead Program
    a. Co-opt plan
2. Retire Exchange
    a. Set Marketing Strategy to Improve the Outcome from Leads
3. HubSpot CRM/Mailing System
    a. Subaccounts available so we can help manage their contacts
    b. Used to send birthday emails, CPR emails, Referral Requests, Seminar invites and Contract Anniversary emails for meetings
4. Top Caliber Leads
    a. Lower cost territory prospecting to build CRM
    b. Seminar Recruiting Calls with Higher Response Rate and more effective communication and information gathering
5. Seminar Programs
    a. Library of Effective Topics to Drive Attendance
    b. “Plug and Play” program, getting attendance can help uncover more opportunities and gather more information on the clients/prospects
6. Elite Case Design and Support
    a. More than best product illustrations, we come up with client strategies that optimize their money for solutions on income, estate tax, long term care, legacy planning and many more solutions!
    b. Simplify your business, ALB will use our carrier contacts to make sales and business management efficient and easy.

Advisor RPM

Elite leads program to find prospects that are more engaged in the search for annuity sales. Program has exclusive territories, using new technology and new outreach to reach prospects where they are looking for information, all leads are automatically uploaded to a CRM and will be actively marketed through an effective program with concepts that will raise interest and turn leads into more opportunities.

This program will create prospects that tell us how much they are considering putting in an annuity, primary financial objectives and explicitly ask for an advisor to contact them for annuity consultation. Average case size for this program is $250,000

Action Items

1. *Marketing Flier:*

   10-5-2, It's All You Need to Do!

   10 Leads for Your CRM
   5 Immediate Conversations with Interested Prospects
   2 Sales from Motivated Clients

   And it doesn't stop there! Using our integrated marketing we continue reaching out to these prospects so those 10 leads can all lead to sales in the future!

   63% of interested prospects will not purchase for 3 – 6 months
   20% of prospects will not purchase for 12 months.
   <u>Staying in front of them with compelling information will lead to more sales.</u>

   Don't leave opportunities on the table! Find Your next Clients and Stay in Touch with them through this innovative lead program!

2. *Formalize the Co-opting program. How will the bonus/payments from ALB work? Put this in writing so it is easy to explain and show a path to accessing the program.*

3. *Develop a name outside AdvisorRPM for this system and AdvisorRPM is the 3rd party group we contract this work to, but it is "our program" that we know how to get the most out of.*

Retire Exchange

The marketing program that will take the agent's current clients, your CRM of clients/prospects and the new leads we cultivate for them and market financial and insurance content that is compelling, accessible and creates interest for the advisor's help and expertise.

Staying in the front of client's minds is important because current clients may have a situation change that leads to an opportunity, prospects will finally make the decision to move on a strategy and leads will be more cost-effective because the interest is there and we will be there when the opportunity for a sales develops by staying in touch with them through an automated, effective marketing strategy.

This

Action Items

1. *Marketing Flier: Tied in with the full program 3 legged stool concept and the Annuity Sales Cycle Idea*

2. *Develop a name outside AdvisorRPM for this system and AdvisorRPM is the 3rd party group we contract this work to, but it is "our program" that we know how to get the most out of.*