



ANNUITY AGENTS
— PODCAST —

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Annuity
Agents Alliance

Marketing • Sales Process • Case Design



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IF YOU WOULD LIKE TO FIND OUT MORE ABOUT US

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MAXIMIZING YOUR OPPORTUNITY IN THE GOLDEN AGE OF ANNUITIES

1. Expense Budget:

- \$ Budget You Spend Every Month!
- Must Increase Efficiency ASAP Due to Limited \$
- Build Business Off of Your Inconvenience, Expand Geography

Four
Budget
Stages
of
Marketing

MAXIMIZING YOUR OPPORTUNITY IN THE GOLDEN AGE OF ANNUITIES

1. Expense Budget
2. **Calendar Budget:**
 - Spend Whatever it Takes to Fill Your Calendar to the Extent You Want it Filled
 - Set Appointment Goals and Reverse Engineer # of Leads Required
 - Use Marketing Addition, Not Replacement

Four
Budget
Stages
of
Marketing

MAXIMIZING YOUR OPPORTUNITY IN THE GOLDEN AGE OF ANNUITIES

1. Expense Budget
2. Calendar Budget
3. **Surplus Budget:**
 - Spend \$ to Have 15-20% More Leads Than Required to Fill Your Calendar
 - Evaluate Budget and Marketing Performance No More Than on an Annual Basis
 - Be Confident Your Are Not “Wasting” Money

Four
Budget
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Marketing

MAXIMIZING YOUR OPPORTUNITY IN THE GOLDEN AGE OF ANNUITIES

Four Budget Stages of Marketing

3. Surplus Budget: Be Confident You're Not "Wasting" Money

Moved from Calendar to Surplus Budget:

\$6K/mo Increase in Marketing Expenses = \$25K/mo Increase in Net Revenues

2014	% of Year	Total Leads per Period	Leads per Week	% of Annual Leads	Average Appointments per Week
Jan-Aug	66%	408	12	58%	5.5
Sept-Dec	33%	291	16	42%	6.4
Total		699			

	Annuity Premiums	% of Annual Sales	Commission Based on 8%	Marketing Expenses	% of Annual Marketing \$'s	Net Revenues	Net Revenues Per Month	Marketing Expenses per Month
Jan-Aug	\$7,192,192	58%	\$575,375	\$96,240	57%	\$479,135	\$59,892	\$12,030
Sept-Dec	\$5,160,097	42%	\$412,808	\$71,816	43%	\$340,991	\$85,248	\$17,954
Total	\$12,352,289		\$988,183	\$168,057		\$820,127		

MAXIMIZING YOUR OPPORTUNITY IN THE GOLDEN AGE OF ANNUITIES

1. Expense Budget
2. Calendar Budget
3. Surplus Budget
4. **Branding Budget:**
 - GEICO, \$400 Million to \$1 Billion
 - Don't Measure Marketing Based on Identifiable Source and Conversion
 - Branding Sources - Radio Commercials, TV, Writing a Book, Paid Endorsements, Collaborative Ventures with Other Professionals, Etc.

Four Budget Stages of Marketing



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MAXIMIZING YOUR OPPORTUNITY IN THE GOLDEN AGE OF ANNUITIES

- The Wind is at Our Back. This is Our Bubble.
- Your Biggest Expense Is Opportunity Loss, Not Marketing; Mitigate It! You Can't Save Your Way to Success in This Business.
- Don't Be a Victim of Marketing Entitlement, Define Your Process Based on Personal Responsibility for Success.
- Have Faith in $1 \times 10 \times 100$ Math Then Add Frequency.
- Frequency + Efficiency = Exponential Growth
- Know Your Marketing Budget Stage and Increase Marketing with Intention.

Thanks for the Biz!

This is
Your
Time!