

GUIDE TO PROMOTING “MAXIMIZING YOUR RETIREMENT INCOME” CAMPAIGN

Suggested Activities & Examples

(Targeting 50-70 yrs. Prospect Lists)

Branch Activities

- Enhanced Branch Training - “Maximizing Your Retirement Income” (FRG Library/Featured Campaigns)
- Birthday Call Campaign - Branch staff to review customer list and call those known to them. For those unknown, see below for tactics to engage.
- Second Prize Option - See seminars listed below
- TV Screens - “Maximizing Your Retirement Income” (FRG Library/Featured Campaigns)

Social Media Posts

- Social Media Content - “Did You Know? Retirement” Social Sequence (FMG)
- Social Media Content - “Considerations Before Filing For Social Security” (Gainfully)
- Social Media Content - “Maximizing Your Retirement Income” (FRG Library/Featured Campaigns)

Website Activities

- Landing Page - “Maximizing Your Retirement Income” (FRG Library/Featured Campaigns)
- Blog/Vlog - “When to Begin Collecting Social Security” video script (MOD)
- Website Banner - “Maximizing Your Retirement Income” (FRG Library/Featured Campaigns)

Email Marketing

- Email - “Social Security Resources” (FMG)
- Brochure - “Basics of Social Security” (MOD)
- Webinar Invite - “Seven Keys..” or “Social Security” (FRG Library/Featured Campaigns)

Print Collateral

- Posters/Flyers/Inserts, etc. - “Maximizing Your Retirement Income” (FRG Library/Featured Campaigns)
- Brochure - “Basics of Social Security” (MOD)

Seminars

- Allianz Seminar - “Seven Keys to Enhancing Benefits”
- Broadridge Seminar - “Social Security”
(Complete seminar kits available in FRG Library)

Themed Events

- Social Security Speaker - Organize event where representative from SSA is guest speaker. Coordinate a speaker [HERE](#).
- CPA Guest Speaker - Organize event where local CPA discusses transitional tax-related
- Birthday Brunch Month - Organize a monthly or quarterly group brunch for clients whose birthday is that month or quarter. Invite them bring a guest and answer frequently asked questions as one approaches retirement.

FMG, Gainfully, MOD (Marketing on Demand) items can be found by entering the title of the piece in their search box in your respective accounts.

Due to MOD and FMG regularly updating their content, some of the proposed pieces may not be available. If you find that your piece is no longer available, please contact your dedicated Marketing Account Manager for assistance in finding a replacement piece.

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