

Top SEVEN Ways Financial Advisors Use Our Software to Get New Customers And Increase their Sales

Our software opens up so many ways to get new business because it is **Quick, Simple, and Visual**. This allows you to work with a client and in 10 minutes punch in their data and be showing them visually where they are going to be. Unlike other programs that take hours to learn and hours to create every plan, the easy-to-use "Retirement Savings Planner 2006 - Professional" software has created a new category of "instantaneous" planning.



With this software in your marketing arsenal, you are now armed to implement some very effective marketing techniques to get more new clients faster than ever before.

Retirement Pro is a snap to use, and may represent the leading edge in a new kind of illustrative software. The user will "get" everything right away.

Richard M. Hoe, CLU, AER, RHU, LUTCF
Insurance Selling Magazine article, October 2004

Here are a just a few of these powerful ideas:

1. Offer a "Free Retirement Analysis" in advertising and marketing efforts:

Since the software will enable you to do a retirement analysis in 10 minutes right in front of the client... you can schedule appointments and give them an instantaneous "plan". Thus, you need to make this as an "offer" in any marketing or advertising that you do. After creating a plan with a client, you now have a qualified client sitting in your office asking you for "help" with any problems that the software has indicated they may have. If they're not a qualified prospect or someone you can help, then give them a printout of their retirement Analysis and send them on their way. "Next".

2. Target Community Groups by offering a "Free Retirement Analysis":

By offering something for "free" and of "value" group leaders will often allow you to get your foot in the door with their members. This is the loss leader to meet and qualify potential clients. Target Community Groups such as churches, YMCA, private clubs, senior groups, etc. A "Free Retirement Analysis" will get you in the door. Obviously if you land any new clients, you use the new client as a referral to other members of the same group.

"I love the Retirement Savings Planner software. It is so colorful and consumer friendly. I've looked at MoneyTree, Profiles and other tools and the Retirement Savings Planner is the best software for me. It is a fantastic door opener no matter what you are selling. It's very user friendly for the sales person and the consumer. People today want something that's quick, catches their interest and gets them to do something right away... Torrid's Retirement Savings Planner is a great tool for me to do that with clients."

Robb Soria, CLU, ChFC, CSA, CRPC, AAMS, CSFP, CEA

3. Target Employers/HR people by offering a "Free Retirement Analysis" for their Employees:

Many employers love personalized service and financial planning can be an added "perk" or "benefit" that the employer offers to its executives or to all employees depending on your target. You spend one-on-one time with highly paid executives and provide them with a free retirement analyses. For regular employees, you can offer group meetings showing the software on a screen and then only meet one-on-one with anyone who signs up or that is near retirement.

4. Get More Referrals from Existing Clients:

Tell your clients every chance you get (email, print, and phone) that they can refer their friends for a "Free Retirement Analyses". You build rapport with existing clients and also get qualified leads by getting their friends to meet with you one-



on-one for their free analyses. (You will need to give your client base the "Free Retirement Analysis" offer first or this method won't work very well).

5. Sell More to Existing Clients While "Giving Good Service":

Every advisor should offer regular "check-ups" for their clients where you review their situation and revisit what you are doing for them. Many advisors don't do this because they have no "plan" for what to meet about.

They have no reason to get the client to meet with them. Using our software, you offer every client a free "retirement check-up". They come into the office perhaps annually and meet with you. You spend a few minutes updating their info in the software and visually showing them where they're going to be,

setting the stage to sell any new products or services that might apply to their situation, while building rapport and relationships year after year.



6. Specialize in a Niche Market and then Offer that Market a "Free Retirement Analyses":

You might target CPAs, Attorneys, Doctors, Laundromat Owners, Hair Salon Owners, etc. You can simply offer by mail, email or phone a "Free Retirement Analyses" to the target market, get appointments, and qualify prospects. Here's an example by phone: "Hello, My name is John Smith and I'm a financial advisor who specializes in helping Attorneys in the Marietta area reduce their taxes, increase their investments, and provide more income in retirement. Do you have any interest in any of those?" "Yes" "Since you don't know me from Adam, what I do is offer a no obligation free retirement analyses where we sit down together and enter

your personal information into my software and in 10 minutes I can show you visually whether you are saving enough for retirement. You

get to meet me. I get to meet you. You learn something about your future retirement plans and we can decide at that point if it makes sense to discuss anything else. Would that interest you? Great when can we meet."

"My clients love the graphic elements - easy to understand - no smoke and mirrors! I let them input their own numbers in an interview so they feel like they own the process. Works VERY well. I believe it is the very best visual retirement planning tool on the market. I will highly endorse your product with my peers."

David B. Cole, CLU, ChFC, CIC, CLTC, CRPC

7. Get More One-on-One Appointments from your Seminars:

Do you give "seminars" as a way to market your services and get more clients? If so, advisors often use our software in seminars to give specific "example illustrations" of common problems and mistakes. So don't just "tell them about it in a powerpoint or verbally", but SHOW THEM the real truth from an independent 3rd party - our software acts as the independent 3rd party. Then at the end of the seminar, offer to do a "Free Retirement Analysis" for everyone who meets with you in your office to go over their financial situation. The free offer coupled with showing how easy the software can illustrate "common problems" gets the potential client motivated to meet with you in person.

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