



## **Top NINE 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

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".

Most likely you will be able to help a significant number of these people and addressing their "fear of running out of money" will set you apart from other advisors in your marketplace.

## **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. 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.

#### **5. 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).





## **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 3<sup>rd</sup> party - our software acts as the independent 3<sup>rd</sup> 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.

### **8. Use Online Meetings with Busy People to Get a Meeting:**

Do you have a lot of trouble getting clients to meet with you? Not because they don't want to but because they say "I'm too busy right now".

Let's face it. Successful people are really busy, especially if they are also juggling family time with work time. Think about people that are doctors, business owners, attorneys, dentists, and similar professions. These people are busy. They have a lot going on. They probably don't have time to drive over to see you. Even if you can drive to see them, they are not 100% sure it's worth their time.



How do you cut through the clutter? Well sign up for an account with GoToMyPC.com for example. This will let you "invite them" to view your computer remotely over the internet. You willing to do whatever it takes to land a new account, with say a doctor? Tell him to call you on his break time and you'll fire up the GoToMyPC software along with the Retirement planner, and walk him through in about 10-15 minutes an overall picture.

If this exercise shows red or gets him thinking about his assumptions and time frames, he will most likely want to continue the conversation, or perhaps it's serious enough that he now wants to meet in person.

How much time did that take you? A couple of phone calls and maybe 20 minutes of your time on the computer in the interactive



portion. By working on "their" schedule, you differentiate yourself from all the other advisors out there hounding them for a meeting. You also demonstrate "why" they should have various concerns by "showing them" their picture and whether they will run out of money. The "visual" is what sells them because "understanding" their own picture is the first step towards them thinking about how to change their plan, modify it, and make better plans. All that points to working with YOU since you are the one helping them draw their picture, and improve their picture.

### **9. Use Online Meeting Systems to hold Low Cost Educational Sessions:**

Are you struggling to come up with the money to do "in person seminars" at restaurants and other venues? Those methods will cost you at least \$5,000-\$10,000 in direct mail marketing plus the cost of the meals and the venue. Maybe you tried that and it didn't work and you got left holding the bill.

There's a better way. Sign up for GoToMeeting.com (up to 10 people) or GoToWebinar.com (up to 1000 people) and use those systems to hold informational webinars and seminars for prospects online. The webinars could be about "basic retirement planning" and you show the Retirement Savings Planner. Then at the end you offer the group the chance to meet with you one-on-one to create a picture specific to their situation.



How many people would rather see what you have to say at 8 or 9pm in the evening from the comfort of their home computer, instead of driving to your office during prime daytime hours?

"But I don't have a list of anyone to invite", you say. Call all your existing and past clients. Tell them you have a great new piece of software that will visually let you do retirement



planning right over the internet. And that you're going to cover topics X, Y, Z, etc. You can cover simple topics like the "Impact of Inflation" on their income needs, or how retirement spends down and depletes investments.

How about have existing clients "bring a friend" or family member onto the webinar so that THEY can see what you can do for them, which is "show them" whether they will run out of money or not.

This is a valuable exercise and offering it CONVENIENTLY in a non-threatening over-the-internet webinar is a great way to get new clients. You can do these webinars for existing customers, and their referrals. You can do them with community groups, "Hey let me do a free retirement education seminar for your group. It won't cost you a penny." Think of some groups that might respond to that offer and call them up.



## **ADDITIONAL RESOURCES:**

Download a free demo or read more about our software online at our website: <http://www.torrid-tech.com>

You can learn about the GoTo brand of online meeting systems at: <http://www.GoToMyPC.com> - can invite one person to view your pc

<http://www.GoToMeeting.com> - can invite up to 10 people into a meeting to view your pc

<http://www.GoToWebinar.com> - can invite up to 1000 people as well as have a registration function and reminder emails all automated by the GoTO system

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