SOCIAL SECURITY COMPLETE CAMPAIGN

Pre-Built, Customizable Consumer Prospecting

FOR PROFESSIONAL USE ONLY.

HOW TOs

DMI's Complete Campaign can help you prospect for clients. Just copy, paste, and deploy individual promotions –or– leverage the entire campaign that's already made. We built this campaign to run weekly, monthly, or any time frame that works for your business. This campaign is designed to promote an online webinar, but you can use these materials for in-person events by simply changing "webinar" to "seminar" throughout.

Choose one or more items per week/month. Simply click the icon to access the Emails, Downloads, and Social Posts.

Copy the images and text and paste them into your applications. The highlighted areas are where you'll need to customize. Don't forget to add your contact information and disclosures where needed.

This Complete Campaign will help get clients and prospects interested in your webinar and each step allows them to register.

Finally, the last step is a Social Security Optimization webinar you'll host on **WEEK 5**.

You'll need to run the webinar itself, but we're giving you the presentation and all the marketing to make it work.

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DMI CREATED CLIENT-FACING COLLATERAL
SOCIAL SECURITY COMPLETE CAMPAIGN

Week	Email 1 — Tuesday	Social Post — Wednesday	Email 2 — Thursday
WEEK 1	Email: Fill The Social Security Income Gap	Retirement expenses are greater than Social Security benefits. Find different ways to bridge the Social Security income gap. #Retirement #RetirementStrategies #SocialSecurity	Email: Are You Facing An Income Gap In Retirement? Download: “Retirement Income Gap Finder”
WEEK 2	Webinar Invitation #1 "Is Social Security Optimized For Your Retirement?"	The average Social Security benefit is only about 40% of a worker's pre-retirement income. Life insurance options can help bridge the income gap. #RetirementStrategies #SocialSecurity #Annuity	Email: Easy Solutions To Bridge Your Income Gap Download: "5 Things You Should Know About Annuities"
WEEK 3	Email: Start Your Retirement Income Analysis Download: “Social Security Fact Finder”	47% of workers retire early due to a health problem. Start planning early for a financially secure retirement. #RetirementPlan #RetirementStrategies #LifeInsurance	Webinar Invitation #2 "Don't Miss The Social Security Optimizer Webinar"
WEEK 4	Email: Will Your Financial Strategy Be Robust Enough? Download: “Athene Social Security IQ”	Buying power isn't what it used to be. Early planning can help you add cushion for a comfortable retirement. See how life insurance can be a smart option. #Retirement #LifeInsurance #SocialSecurity	Webinar Invite #3 "Hurry — Last Chance To Register"
WEEK 5	PPT Presentation for Webinar		Registered but didn’t attend Attended and made an appointment Attended but didn’t make an appointment

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Week	Email 1 — Tuesday	Social Post — Wednesday	Email 2 — Thursday
WEEK 1	Email: Fill The Social Security Income Gap	Retirement expenses are greater than Social Security benefits. Find different ways to bridge the Social Security income gap. #Retirement #RetirementStrategies #SocialSecurity	Email: Are You Facing An Income Gap In Retirement?

Suggested subject line: Fill the Social Security Income Gap

{Client name},

Did you know, **the average Social Security benefit is only about 40% of a worker's pre-retirement income.**[1] That's why creating a strategy for your retirement income is so important.

Check out these stats and get to know today's reality. Then, explore options to help bridge your income gap.

Retirement expenses are greater than Social Security benefits

$1,520 average monthly Social Security payment per month[2]

$3,965 average monthly expenses age 65 and older[3]

39% of retirees spend more than $750/month on health care alone[4]

72% of workers think they will work for income in retirement[5]

You may retire earlier than expected

47% of workers retired early due to a health problem[6]

64% of men sign up for Social Security benefits before full retirement age[7]

36% of workers retired early due to changes in the skills required[8]

69% of women sign up for Social Security benefits before full retirement age[9]

Buying power isn't what it used to be

30% loss of Social Security benefits value since 2000[10]

252% increase in prescription drug costs since 2000[11]

99.3% increase in cost of goods and services purchased by retirees since 2000[12]

174% increase in homeowners insurance since 2000[13]

129% increase in real estate taxes since 2000[14]

Call me today so we can talk about ways to create a more comfortable retirement. Together, we'll create a strategy to access flexible, tax-advantaged money in retirement and help bridge your income gap.

Sincerely,

{producer contact information}

[1] https://www.ssa.gov/benefits/retirement/learn.html#2
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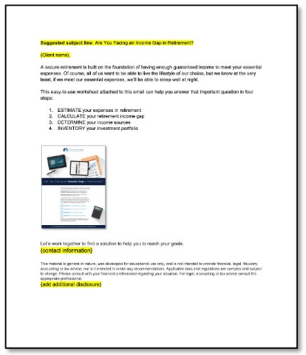
{add additional disclosure}



Download: "Retirement Income Gap Finder"

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WEEK 2

Week	Email 1 — Tuesday	Social Post — Wednesday	Email 2 — Thursday
	Webinar Invitation #1 "Is Social Security Optimized For Your Retirement?"	The average Social Security benefit is only about 40% of a worker's pre-retirement income. Life insurance options can help bridge the income gap. #RetirementStrategies #SocialSecurity #Annuity	Email: Easy Solutions To Bridge Your Income Gap Download: "5 Things You Should Know About Annuities"

Hi {Name},
Social Security provides retirement income for nearly every American worker. Deciding when and how to claim benefits is one of the most important decisions retirees make. Join me on DATE AND TIME for a Webinar that includes topics like:

- Old Age Survivor and Disability Insurance Program
- FRA and the PIA Red Zone
- Spousal Benefits and Divorced Benefits
- The Power of Social Security Optimization
- The Power of Waiting and the power of Stacking

- Cost-Of-Living Adjustments
- Understanding the taxation of Social Security benefits
- The Athene Retirement Optimizer

Deciding when to file is not a "one size fits all" choice. Understanding all your options will help you find a solution that works for you.
Click the link below join me for the Social Security Optimizer Webinar on DATE and TIME.

REGISTER NOW

Thank you and I look forward to seeing you there!

Sincerely,
{ contact information }

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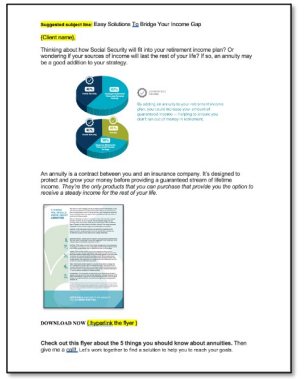
{ add additional disclosure here }



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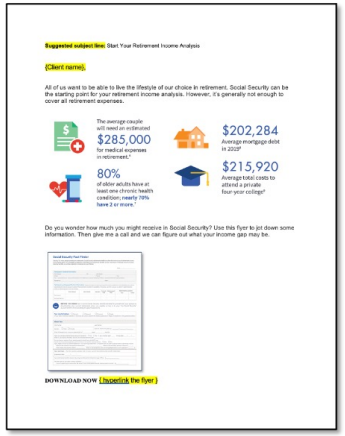
WEEK 3

Week	Email 1 — Tuesday	Social Post — Wednesday	Email 2 — Thursday

Email 1 — Tuesday

Email: Start Your Retirement Income Analysis



Suggested subject line: Start Your Retirement Income Analysis

{Client name},

All of us want to be able to live the lifestyle of our choice in retirement. Social Security can be the starting point for your retirement income analysis. However, it's generally not enough to cover all retirement expenses.

The average couple will need an estimated $285,000 for medical expenses in retirement.*

$202,284 Average mortgage debt in 2019*

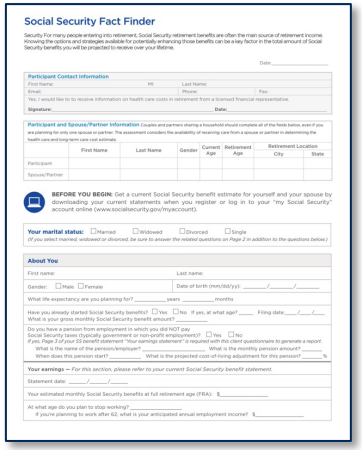
80% of older adults have at least one chronic health condition; nearly 70% have 2 or more.*

$215,920 Average total costs to attend a private four-year college*

Do you wonder how much you might receive in Social Security? Use this flyer to jot down some information. Then give me a call and we can figure out what your income gap may be.

DOWNLOAD NOW { hyperlink the flyer }

Download: "Social Security Fact Finder"



Social Security Fact Finder

Security. For many people entering into retirement, Social Security retirement benefits are often the main source of retirement income. Knowing the options and strategies available for potentially enhancing those benefits can be a key factor in the total amount of Social Security benefits you will be projected to receive over your lifetime.

Participant Contact Information

Participant and Spouse/Partner Information Couples and partners sharing a household should complete all of the fields below, even if you are planning for only one spouse or partner. The assessment considers the availability of receiving care from a spouse or partner in determining the health care and long-term care cost estimates.

BEFORE YOU BEGIN: Get a current Social Security benefit estimate for yourself and your spouse by downloading your current statements when you register or log in to your "my Social Security" account online (www.socialsecurity.gov/myaccount).

Your marital status: ☐ Married ☐ Widowed ☐ Divorced ☐ Single

About You

Your earnings — For this section, please refer to your current Social Security benefit statement.

Social Post — Wednesday

47% of workers retire early due to a health problem. Start planning early for a financially secure retirement.

#RetirementPlan #RetirementStrategies #LifeInsurance

Email 2 — Thursday

Webinar Invitation #2
"Don't Miss The Social Security Optimizer Webinar"

Hey {Name},
Our Social Security Optimizer Webinar is quickly approaching. We don't want you to miss it!

Social Security was never intended to replace the full amount of a retiree's previous income. But it does provide a significant portion of guaranteed income in retirement. Do you know what your expected benefit will be when you should file for benefits, or what choices you can make to maximize what you will receive?

Join me on DATE AND TIME for a Webinar that includes topics like:

- Old Age Survivor and Disability Insurance Program
- FRA and the PIA Red Zone
- Spousal Benefits and Divorced Benefits
- The Power of Social Security Optimization
- The Power of Waiting and the power of Stacking
- Cost-Of-Living Adjustments
- Understanding the taxation of Social Security benefits
- The Athene Retirement Optimizer

Deciding when to file is not a "one size fits all" choice. Understanding all your options will help you find a solution that works for you.

Click the link below join me for the Social Security Optimizer Webinar on DATE and TIME.

REGISTER NOW
{ hyperlink webinar registration info }

Thank you, and I look forward to seeing you there!

Sincerely,
{ contact information }

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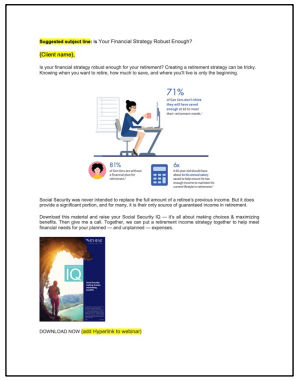
WEEK 4

Week	Email 1 — Tuesday	Social Post — Wednesday	Email 2 — Thursday

Email 1 — Tuesday

Email: Will Your Financial Strategy Be Robust Enough?



Suggested subject line: Is Your Financial Strategy Robust Enough?

{Client name},

Is your financial strategy robust enough for your retirement? Creating a retirement strategy can be tricky. Knowing when you want to retire, how much to save, and where you'd like to only the beginning.

71%

81%

6x

Social Security was never intended to replace the full amount of a retiree's previous income. But it does provide a significant portion, and for many, it is their only source of guaranteed income in retirement.

Download this material and relax your Social Security IQ — it's all about making choices & maximizing benefits. Then, call us to see how we can help you create a retirement income strategy together to help meet financial needs for your planned — and unplanned — expenses.

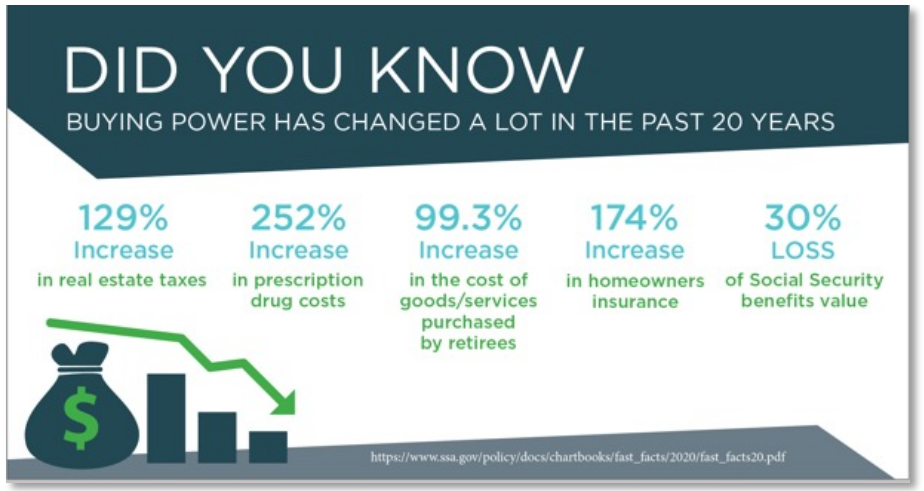
IQ

DOWNLOAD NOW {add Hyperlink to webinar}

Download: "Athene Social Security IQ"

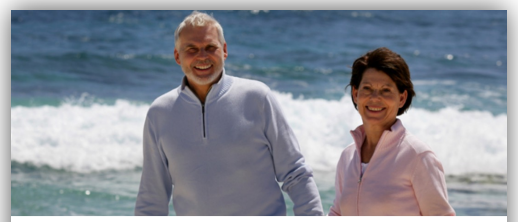
Social Post — Wednesday

Buying power isn't what it used to be. Early planning can help you add cushion for a comfortable retirement. See how life insurance can be a smart option.
#Retirement #LifeInsurance #SocialSecurity



Email 2 — Thursday

Webinar Invite #3
"Hurry — Last Chance To Register"



Hey {Name},
This is it! Our Social Security Optimizer Webinar is almost here and this is your last chance to register.

Let me help you walk through all your Social Security options so you can make better informed choices for your Retirement Income Strategy.

Join me on DATE AND TIME for a Webinar that includes topics like:

- Old Age Survivor and Disability Insurance Program
- FRA and the PIA Red Zone
- Spousal Benefits and Divorced Benefits
- The Power of Social Security Optimization
- The Power of Waiting and the Power of Stacking
- Cost-Of-Living Adjustments
- Understanding the Taxation of Social Security Benefits
- The Athene Retirement Optimizer

REGISTER NOW

{ hyperlink webinar registration info }

Let's build your best Retirement Income Strategy. I look forward to seeing you there!

Sincerely,
{ contact information }

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REGISTRATION FOLLOW UPS

DMI recommends developing a rapport with prospects before the webinar.
Give everyone who's registered for your event a confirmation call.

(Live Person)
Hi there! My name's [Name] and I'm calling from [Company Name]. This is just a courtesy call to remind you of your reservation for the webinar on [date].

We will be covering Social Security Retirement Income Optimization Strategies.

It will start at [start time], and will run for approximately [length of presentation]. Do you need any additional information?

Great! Well, it was good speaking with you today and I look forward to seeing you at the webinar!

(Script if they cancel the call)
Ok, that's fine... We'll cancel your reservation. But we'll keep you in mind when we have upcoming events and workshops.

And, what we can do, if you like, is send you a recording of the presentation. Would you like us to do that?

-Or-

I'm happy to have you come in for a complimentary consultation...

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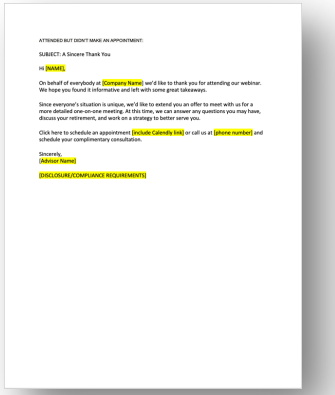
WEEK 5

Week	Host Your Webinar on Tuesday or Thursday	24-48 Hour Follow-Ups

PowerPoint Presentation "Social Security Optimization"

In addition to follow-up phone calls, you should email every 'bucket' of your attendee list within 24-48 hours of your event.

- Registered but didn't attend
- Attended and made an appointment
- Attended but didn't make an appointment


ATTENDED BUT DIDN'T MAKE AN APPOINTMENT:

SUBJECT: A Sincere Thank You

Hi [NAME],

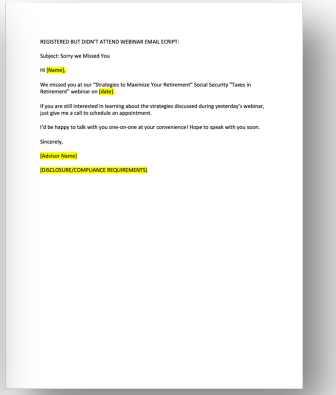
On behalf of everybody at [Company Name] we'd like to thank you for attending our webinar. We hope you found it informative and left with some great takeaways.

Since everyone's situation is unique, we'd like to extend you an offer to meet with us for a more detailed one-on-one meeting. At this time, we can answer any questions you may have, discuss your retirement, and work on a strategy to better serve you.

Click here to schedule an appointment [include Calendly link] or call us at [phone number] and schedule your complimentary consultation.

Sincerely,
[Advisor Name]

[DISCLOSURE/COMPLIANCE REQUIREMENTS]


REGISTERED BUT DIDN'T ATTEND WEBINAR EMAIL EXCRPT:

Subject: Sorry we Missed You

Hi [Name],

We missed you at our "Strategies to Maximize Your Retirement" Social Security "Taxes in Retirement" webinar on [date].

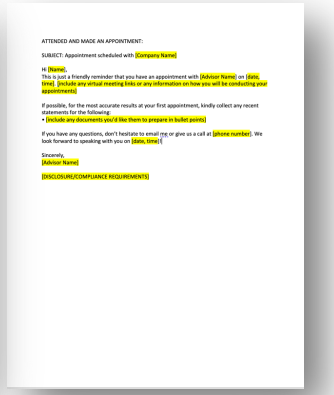
If you are still interested in learning about the strategies discussed during yesterday's webinar, just give me a call to schedule an appointment.

I'd be happy to talk with you one-on-one at your convenience! Hope to speak with you soon.

Sincerely,

[Advisor Name]

[DISCLOSURE/COMPLIANCE REQUIREMENTS]


ATTENDED AND MADE AN APPOINTMENT:

SUBJECT: Appointment scheduled with [Company Name]

Hi [Name],
This is just a friendly reminder that you have an appointment with [Advisor Name] on [date, time]. [include any virtual meeting links or any information on how you will be conducting your appointment]

If possible, for the most accurate results at your first appointment, kindly collect any recent statements for the following:
• [include any documents you'd like them to prepare in bullet points]

If you have any questions, don't hesitate to email me or give us a call at [phone number]. We look forward to speaking with you on [date, time].

Sincerely,
[Advisor Name]

[DISCLOSURE/COMPLIANCE REQUIREMENTS]

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SOCIAL MEDIA WEBINAR PROMOTIONS

Broaden your audience with paid promotion

Your social media pages get seen by your followers, but to find new prospects, you may need to broaden your audience.

Consider paying to "boost" your post (or make it an ad) to get exposure to a wider audience.

Sprinkle these posts promoting the webinar throughout the 4 weeks leading up to your webinar date. Be sure to include the link to register to your webinar!

- "Are Your Optimized for Retirement?"
- "Is Your Retirement Strategy Optimized?"
- "Make Social Security the Cornerstone of Your Retirement."

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HELPFUL TIPS

Here are some quick tips to help you along the way.

Want to blast out a lot of emails? Check out Mailchimp and Constant Contact or a CRM like HubSpot.

Need help with analytics from email or your event? Give DMI a call — we may be able to give you insight.

Remember, this doesn't have to be an online event. Just be sure to adjust the wording to reflect your educational event.

We've included social media post options for promoting your webinar. Consider paying to "boost" your post (or make it an ad) and run it throughout the 4 weeks.

Target Audience:
- Ages 55-65

Never give advice during your webinar. Always suggest a “complimentary consultation.”

Remember, **this is a process NOT a product sale**. It will probably take 3-4 months after your webinar to close a sale.

Become a CSSCS member and get Certified in Social Security Optimization. Then take our class to increase your sales. Call DMI today and find out how.

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