



# FIA & MYGA COMPLETE CAMPAIGN

**Pre-Built, Customizable  
Consumer Prospecting**



## 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, disclosures, and obtain any required compliance approvals from your BD, RIA, or appointed carriers.

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 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.





# DMI CREATED CLIENT-FACING COLLATERAL MYGA & FIA COMPLETE CAMPAIGN



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

WEEK 3



Is your nest egg protected from market volatility?

**Suggested subject line:** Is your nest egg protected from downside market risk?  
**Hi (Client name),**

The closer you get to retirement, the more important it is to protect what you've worked so hard for. Money invested in the stock market can be subject to unpredictable swings — up and down, bull or bear. Volatile markets can have a significant impact on retirement income. Is it possible to limit your exposure to volatile markets but still grow your nest egg?

During Periods of Market Decline, an FIA Holds Its Value.

**[DOWNLOAD NOW]**

Download this flyer to better understand how a Fixed Index Annuity reset strategy may help you weather market downturns. Then let's talk about your current situation to see if an annuity may fit in your retirement strategy.

Let's set aside some time and talk about your current situation.

Sincerely,

**[Include contact information]**

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. Please consult with your financial professional regarding your situation. For legal, accounting or tax advice consult the appropriate professional. **[Add additional disclosure]**



Download:  
"The Power of Annual Reset"

**THE POWER OF ANNUAL RESET**  
A FIXED INDEX ANNUITY RESET STRATEGY MAY HELP YOU WEATHER MARKET DOWNTURNS.

Annual reset is just one aspect of Fixed Index Annuities (FIAs), and should be part of a complete discussion including features, costs, terms, and conditions.

**Hypothetical Fixed Index Annuity - S&P 500 Index**  
Hypothetical Annual Reset for Asset Retention  
Hypothetical 50% participation rate

**S&P 500 Index**

**Hypothetical Minimum Guaranteed Value:**  
\$250,000 (with 10% bonus) earned interest credits LOCKED IN on contract anniversary.

Talk with a financial professional for a more detailed FIA discussion. 122.456.7891 | www.website.com | Address

Did you know annuities come in different types to help meet different needs? One of the ways they vary is by the amount of potential risk and return.

Where do you fit on this spectrum?  
#Annuities #RetirementStrategies #TheMoreYouKnow



**RISK vs. RETURN**  
COMPARING ANNUITY TYPES

Annuities are long term retirement income products offering a variety of ways to help grow your money. The growth of fixed annuities is typically guaranteed by the issuing company whereas registered and variable products involve market risk including possible loss of principal. Any annuity guarantees are backed by the financial strength and claims-paying ability of the issuing company. Product and feature availability may vary by state. This is not a comprehensive discussion of annuities. Be sure to carefully review all features, benefits, costs, terms and restrictions before making a purchasing decision.



Webinar Invitation #2  
"How Far Will Your Dollar Go In Retirement"

SUBJ: How Far Will Your Dollar Go In Retirement?

**HOW FAR WILL YOUR DOLLAR GO IN RETIREMENT?**

Hi (Name),

With interest rates hitting historic highs and CDs losing purchase power by the minute, you've got to be wondering about how to take risk off the table while ensuring a steady stream of retirement income.

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

- State of the Market
- Volatility & Inflation
- Annuities 101
- What role FIAs and MYGAs may play in retirement

We'll be going over all these concepts as well as ways to potentially offset risk in retirement and guarantee income for life. Click the link below to join me for this special webinar on **DATE and TIME**.

(Add registration link)

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

Sincerely,

**[Include 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 what's going on in the market and some income strategies to help take risk off the table.

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 seminars.

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 appointment...

# DMI CREATED CLIENT-FACING COLLATERAL MYGA & FIA COMPLETE CAMPAIGN



Week	Host Your Webinar on Tuesday or Thursday	24-48 Hour Follow-Ups
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WEEK 5

 PowerPoint Presentation "The Role of FIAs and MYGAs"

## THE ROLE OF FIAs AND MYGAs

How Annuities can help address today's biggest retirement income concerns

Hosted by: Name Last Name



**YOUR LOGO HERE**  
your tagline goes here

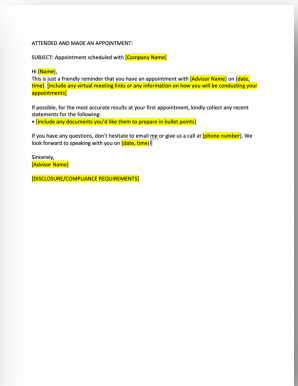
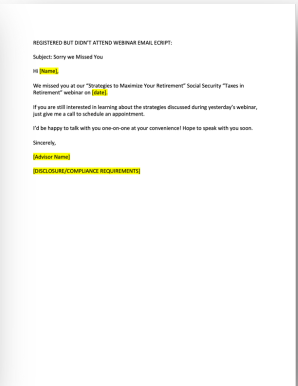
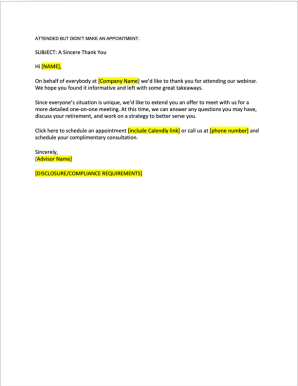
In addition to follow-up phone calls, you should email every 'bucket' of your attendee list within 24-48 hours of your event.



Registered but didn't attend

Attended but didn't make an appointment

Attended & made an appointment





# 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 your webinar!



"Don't Fear The Bear"



"How Far Will Your Retirement Dollar Go?"

Please note that social media posts should link to a website page that includes your firm's compliance disclosures.

Don't Fear The Bear!

Join **THE COMPANY NAME** on **DATE** as we take a look at the state of the market and how you may be able to take risk off the table while creating income for life. We'll go over:

- Volatility & Inflation
- Purchasing Power
- Sequence of Returns Risk
- Annuities 101
- The Difference Between FIAs and MYGAs
- Creating Guaranteed Lifetime Income

**REGISTER HERE**

Understanding your situation and your options can give you the power to make the best decisions for you and your family. Join us as we try to set you up for success.

#retirementincomestrategies #guaranteedlifetimeincome #dontfearthebear

A photograph of a family of four (two women, a man, and a child) smiling outdoors in a park-like setting. A blue banner is overlaid at the bottom of the photo with the text "HOW DO YOU GUARANTEE RETIREMENT INCOME?".

A photograph of an older woman with short blonde hair wearing a yellow scarf, smiling and talking to an older man. A blue banner is overlaid at the bottom of the photo with the text "HOW FAR WILL YOUR DOLLAR GO IN RETIREMENT?".



## 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 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 50-70

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

Remember, **this is a process NOT a product sale**. In fact, the goal is not to sell product at this event. It will probably take 3-4 months after your webinar to close a sale.

