

## Financial Help Centers Marketing Ideas & Instructions

**(Important!** Always have your label (your name, phone #, website, and the offer of the full edition of the book for free) on the back cover! Click [here](#) to see a sample of how the label should look on the back cover.

To create the label, go to [www.financialhelpcenters.com/label](http://www.financialhelpcenters.com/label) Just enter your name, phone #, and website, and your label will be created for you.) You will create a label and put it on the back cover of the books (use Avery label # 8163 – 2"x4" label). Print the label and place it on the back cover and inside cover.:

### New marketing idea

#### Letter to clients and prospects to generate referrals

Remember: every client has at least three to five referrals they can give you. Every prospect has at least three to five referrals they can give you.

Here is the question: **How can you get the client and prospect to ‘voluntarily & painlessly’ give you referrals?**

This is the letter you send to clients to generate referrals using the book. **Agents using this letter and book are getting between 10% - 60% in referrals from clients and prospects!** It gets excellent results:

First call the client and say ***‘I just want to let you know that I am sending you a retirement planning book. I just want to give you a heads up’***

Then send the book with the following letter:

‘Dear (client)

Thank you for your business in 2011. It has been an interesting year.

I believe investor education is one of the best ways I can help you .

I have enclosed Bruce Sankin’s valuable financial & retirement planning book ***“What All Stock & Mutual Fund Investors Should Know! Special Retirement Edition”***. Bruce Sankin is a nationally recognized best selling financial author and columnist, an arbitrator for FINRA, and consumer advocate for investor education. This book is sold at Amazon, Barnes & Noble, and all major book stores for \$19.95.

If you find this book interesting, please give me the names of three people your care about and I will send them a copy of this book with your compliments.

Thank you again for your business and your trust.

Regards,'

Contact your client no later than five days after you send the letter and book. Ask the client if they received the book. Then say ***'By the way, if you have any family or friends, I would be glad to send them a copy of the book with your compliments'***

If you have sent your client the [special autographed copy](#), then say the following:

***I work directly with Bruce Sankin because we both believe in investor education for my clients. 'By the way, if you have any family or friends, I would be glad to send them a personally autographed copy of the book with your compliments'***

When you get the referral's information, call them and say ***'my client and your friend (client's name) gave me your name because I gave (client) a valuable financial & retirement planning book; and (client) wanted me to give you a copy.***

Try to get the appointment and use the paperback book as the hook for the appointment.

If the referral is not receptive, then give them the link to the ebook, don't send them the paperback!  
There is no reason to spend money on the paperback book for an unresponsive referral.

If the referral is receptive, say ***'By the way, if you have any family or friends, I would be glad to send them a copy of the book with your compliments'***

### [Next marketing idea](#) [When you deliver a policy](#)

When you sold a product to a client, or when you deliver the policy to the client, at the end of the meeting, when you are about to leave turn to the client and say ***"thank you, I appreciate your business.***

Then take out and give them a copy of the book and say ***'... as a thank you for your business, I would like to give you a copy of this financial and retirement planning book. I know it will help you with planning your retirement'***.

Then say ***'...if you would like, I would be glad to give this book to your friends and family with your compliments. Who would you like me to give it to?'***

### [Next Marketing Idea](#) [Send this email to everyone you have an email address](#)

If you don't want to send the books, Email the following to clients and prospects, Subject line: Free Retirement Planning Book, Higher Rates:

"Dear client/prospect,

Wow! It is hard to believe that we are in 2011. Financial gurus, economists, analysts and government officials have not been able to agree on the state of the economy.

Certainly we all know how the rising costs of fuel, food, and other goods have affected us.

I believe that education is one of the best ways to build a solid financial future. We are now offering Bruce Sankin's valuable financial and retirement planning book "What All Stock and Mutual Fund Investors Should Know!" (\$19.95 retail value!) **FREE**. Visit [www. \(Your website\)](#) to obtain your free copy.

Please contact us with any questions you may have on your insurance and investments or to learn about the latest investment products. Find out if you qualify for the new higher interest rates on fixed annuities."

Good luck,

Send this email to every person you have an email address!

**Send an email every month! It is normal for a prospect to take 3-4 months before they respond. When a prospect goes to your website and fills out and submits the form, this lead is sent to your email. Call them and say the following:**

**'...my name is ... and you had gone to my website and requested Bruce Sankin's best selling financial and retirement book; plus information on (if they asked for other information )**

Before we speak about your request, let me give you the link to Bruce Sankin's book as I promised. (you give them the link to the book)

Then you answer their questions about retirement or insurance.

If they just want the book, ask them if you could send them information or can you contact them in the future. What are they interested in, retirement, insurance, protection assets in retirement, LTC, etc.

### **Next Marketing Idea** **Create a new business card**

Here is a sample business card that will begin conversation between the agent and whoever gets the business card.

**This Business Card has an Offer & Call to Action!** It is another tool that will help the agent. It comes with the FHC package.

Remember! Every time you give someone this business card, say **“By the way, come to my website and I will give you a valuable retirement planning book!”**

**SECRETS REVEALED  
THAT INVESTORS  
MUST KNOW!**

*What all stock  
& mutual fund  
investors  
should know!*

In addition, become a smarter  
investor on annuities, life  
insurance, and other investments.

Special Retirement Edition

**BRUCE N. SANKIN**

**Free Retirement Planning Book!**

**Bruce Sankin**

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### Next marketing Idea

### Go after annuity, insurance, 401k, 403b, and IRA business

You have the following top level domains and website addresses:

Financialhelpcenters.com

Insurancehelpcenters.com

Annuityhelpcenters.com

401khelpcenters.com

403bhelpcenters.com

Irahelpcenters.com

Ltchelpcenters.com

Tsphelpcenters.com

Medicarehelpcenters.com

Retirementhelpcenters.com

Next, use your websites as a tool that will relate to the prospects needs. Use these addresses to show the prospect you are an expert in a specific area.

Take advantage of the perception that when your website address has a specific area of expertise, you are perceived by the prospect as an ‘expert’ in that specific.

Here is an example and this is what you will say to a prospect:

Prospect needs help in annuities, say the following: **‘...I happen to be an expert in annuities. In fact, come to my annuityhelpcenters.com website and I will answer all your questions on annuities and give you a valuable financial & retirement planning book...’**

Prospect has a 401k plan, say the following: '**... part of my service is to work specifically with 401k plan participants. In fact, come to my [401khelpcenters.com](http://401khelpcenters.com) website and I will help you plan for your retirement and give you a valuable financial & retirement planning book...**'

Prospect need information on insurance, say the following: '**... I happen to be an expert on helping people with their insurance needs. In fact, come to my [insurancehelpcenters.com](http://insurancehelpcenters.com) website and I will help you with your insurance needs and give you a valuable financial & retirement planning book...**'

Prospect has an IRA, say the following: '**... I happen to be an expert and specialize in helping people with all types of IRA accounts. In fact. Come to my [irahelpcenters.com](http://irahelpcenters.com) website and I will help you plan for your retirement and give you a valuable financial & retirement planning book...**'

Prospect is concerned about retirement, say the following: *'...I happen to be an expert and specialize in helping people plan for their retirement. In fact. Come to my retirementhelpcenters.com website and I will help you plan for your retirement and give you a valuable financial & retirement planning book...'*

### Next marketing idea

## Event Marketing

This is an example of successful event marketing using Financial Help Centers.

Here is the poster I made at Kinko's.

I told everyone who took my business card that the book is \$19.95 at all book stores; but if they go to my website and fill out and submitted the form, I would contact them and give them the ebook for free.



Create a sign or poster from this postcard. Make the poster in Photoshop.

An agent used this sign and books at a 'Client Appreciation Dinner' (Event). He created this sign out of the Financial Help Centers post card. Here are his results:

**66% of his clients 'requested' the book.**

**20% of his clients gave the agent referrals.**

**The agent did \$320,000.00 in new annuity premium from referrals using FHC.**

**Agent is still generating more business and referrals from the event!**

### Next marketing idea

***Use the books as give away when you want people to come to your seminar or lecture. "FIRST 50 PEOPLE WHO REGISTER FOR MY SEMINAR WILL RECEIVE THE BOOK"***

### **Next Marketing Idea**

Go to restaurants where working people go to lunch. Ask the owner of the restaurant if you can put the book by the cash register in a book holder (lock the book to the holder; otherwise someone will steal the book). Put a small 'catch bucket' under the book holder. Put a note on the holder saying **"DROP IN YOUR BUSINESS CARD AND RECEIVE A FREE EBOOK COPY OF THIS BEST SELLING FINANCIAL ANAD RETIREMENT PLANNING BOOK. RETAIL VALUE \$19.95"**. One agent was getting five to twenty business cards a month.

To purchase additional books, go to [www.financialhelpcenters.com/fp](http://www.financialhelpcenters.com/fp). There is a special discount for financial professionals. The full edition is only \$9.95/copy. This is a 50% discount. This is the same wholesale price that Amazon and Barnes & Noble pays for the book.

Financial Help Centers, and this book marketing campaign works all the time. You will generate many referrals from clients and good prospects. Go to [www.financialhelpcenters.com/testimonials](http://www.financialhelpcenters.com/testimonials) and you will see many success stories from advisors using these books.

Please contact me with your success stories and ideas. I like to tell other agents and advisors.

#### **BRUCE SANKIN**

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**Free – Retirement Planning Book!**

