



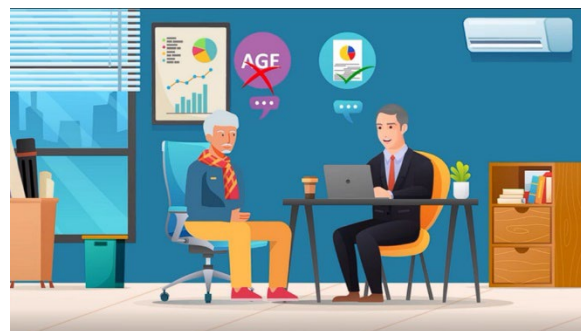
## Updated Animations Ready for Video Booklets

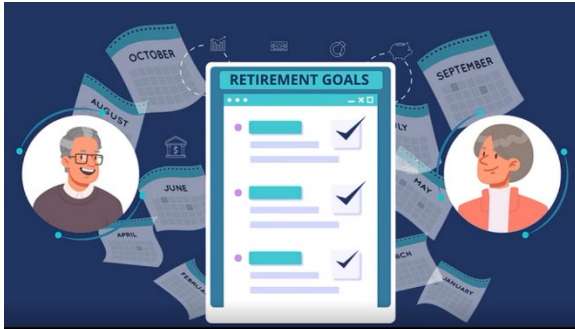
With the recent laws and changes to retirement plans, we decided to do a complete overhaul of our video animations. We now have a completely new look for our video animations that are also SIS compliant. For all advisors who have ordered custom-branded video books, you can visit our school page and download all the videos easily. Make sure to delete the old ones so you don't accidentally add them to your video books!

We've already updated the animations on your websites, and we are working on updating the drip email campaign in iContact. We'll keep you updated when they've been completed within your account.

## New Look, New Video

We've completely rebuilt these videos with new characters and now they're in color! We've also updated any outdated information due to recent law changes and made the videos more evergreen to minimize future changes.





We've also created a new video on Taxes & Fees that you can start utilizing right away (see the link below).

### Updated Animations\*

1. [Money Markets \(Track 1\)](#)
2. [Stock Market History \(Track 3\)](#)
3. [Bonds vs. Bond Funds \(Track 5\)](#)
4. [Variable Annuities \(Track 6\)](#)
5. [Investing for Income \(Track 8\)](#)
6. [SIS Investment Approach \(SIS Active Management\)](#)
7. [DIY Sherpa Wedge \("Do-It-Yourself" Investors\)](#)
8. [Mousetrap Wedge \(Shopping for an Advisor\)](#)
9. [7 Retirement Risks](#)
10. [Estate Planning](#)
11. [RMDs](#)
12. [Social Security](#)
13. [IRAs](#)
14. [Taxes & Fees \(NEW\)](#)
15. [SIS Intro](#)

***\*Do not use the above Vimeo links to share with prospects or clients.***

The Vimeo links do not include any compliance disclosures. Please use the links embedded on your website. Not only will you stay compliant, but it looks more professional and will increase website traffic. If you are not utilizing our Video Animation Email Funnel and do not have these videos embedded on your website, please submit a [Marketing Order Form](#) to have the links and emails created.

### Video Booklets









To utilize these videos for your video booklets, you'll need a smaller version of each video. We've created a page on our school website where you can download the video that is suited for the video booklet.

Use the link below and click on the **Download** button under each video:

<https://advisorsacademyschool.com/video-animations/>

**Video Booklets Version**

Please use the links below to download the following animations for your video booklets. These videos have been optimized to fit these booklets. If you plan to use the videos for any other marketing purposes, please use the high quality video links at the bottom of this page.

			
7 Retirement Risks	Bond vs Bond Funds	Estate Planning	DIY Sherpa Wedge
<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">Download</a>
			

## Personal Videos

Many advisors are also recording personal videos to prospects and adding those to their custom-branded video book. It adds a great personal touch as the first video for a specific prospect. I recommend recording a personal video and then choosing 2 video animations to add as well. Some advisors also add their sizzle reels or welcome videos to the video books, which is excellent for posturing. Below are some examples you can view. If you want a sizzle reel, just send an MOF to the Marketing Team and they will put one together for you.

## Sizzle Reel Examples:

- Andrew Agency: <https://vimeo.com/476011499/42af1c93f0?share=copy>
- Micah Keel: <https://vimeo.com/824795408/65d992c357?share=copy>
- Anthony Saccaro: <https://vimeo.com/722264937/a62c31a2ec?share=copy>
- David Wright: <https://vimeo.com/855038708/1c10951a9a?share=copy>

## Welcome Video Examples:

- Welcome to ASC Financial: <https://vimeo.com/811061123/ad4a6ce083?share=copy>
- Welcome to Retirement Income Source Sarasota: <https://vimeo.com/874838403/cbfae14ea?share=copy>
- Welcome to Peak Capital Management: <https://vimeo.com/696223838/12e2ad2c75?share=copy>
- Welcome to Arbor Financial: <https://vimeo.com/657203419/d72e7a5261?share=copy>

## Custom-Branded Video Books:

The custom-branded video books are a great tool to get more 2<sup>nd</sup> appointments scheduled and increase overall closing ratios. Compared to just delivering the animations via email and through drip campaigns, tangible books have more traction and overall results.

- Excellent for posturing, branding, wedging, and the Sales Process, delivered in a fun, easily digestible format.
- Video books get opened multiple times, shown to friends/family, and have a much longer “shelf life.”
- Emails tend to get “lost” or forgotten about and may end up in spam folders.

[Click Here to Order!](#)

## Examples of Custom-Branded Video Books:



## Ways to Use the Video Animations and Books:

- 1. Hot Prospects in your Office**
  - a. Punting to 2<sup>nd</sup> meeting or “Need to think about it...”
  - b. Get a second appointment set while still in your office.
- 2. Drip Marketing Campaigns**
  - a. 17 emails with animations, sent over 17 weeks.
  - b. They can be set up in iContact and branded for each advisor.
- 3. Mailing Campaigns – Embedded on Landing Page**
  - a. LeadJig “Confirmation” email the day before the event, RSVP splash page, and “No Show/Cancel” email the day after the event

- b. We've already sent the videos to your Leadjig rep on each workshop topic, but always double-check!
- c. Workshops: RMDs, Estate Planning, Social Security, IRAs, Tax-Saving Strategies

#### **4. Personal Websites – Embedded and Sign-Up Form**

- a. Option to add name/email capture to sign up to watch the animations.
- b. Or have them accessible in a drop-down menu on the website

#### **5. Hot Prospect Package**

- a. Pick 20-40 hot prospects you didn't close yet whose statements you have already reviewed.
- b. Overnight the prospect the video book with a personal note, asking them to call your office if they have questions or want to set up another meeting.
- c. Choose the 3 Sales Tracks (animations) that relate to their specific investment red flags and add them to their book.

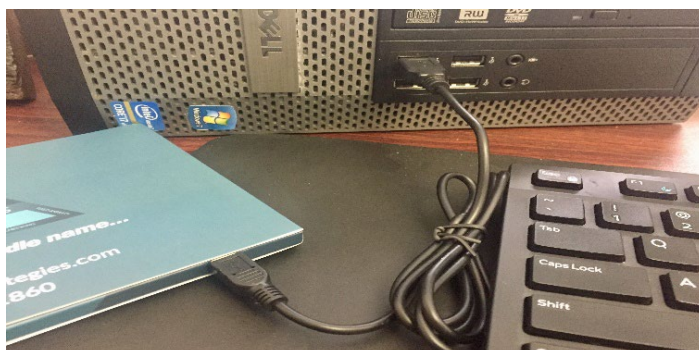
#### **6. Target High-Net Worth Prospects**

- a. We can pull a list of 20-40 very affluent prospects in your area.
- b. Overnight them the video book with a personal note, asking them to call your office if they have questions or want to set up a 15-minute call or meeting.
- c. IPA: \$1M+

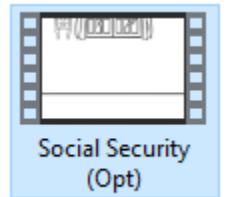
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### **Instructions to Add Animations to Video Books**

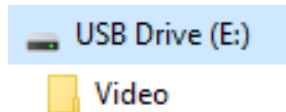
1. Save the video files provided on this thumb drive to your computer, either on the desktop or in a folder.
  
2. Plug in the video book to your computer using the USB cable provided.



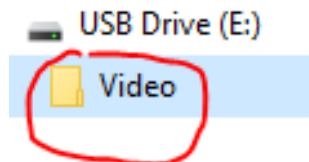
3. Select the video file you would like to add to your book. After selecting your file, press the “Ctrl” and “C” keys at the same time, to copy it. You can also click the right mouse button on the video file and select “Copy.”



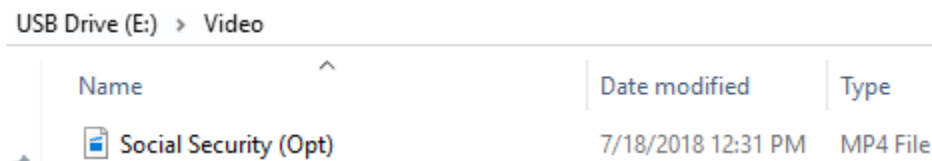
4. Go to your “File Manager”, find the USB port that you plugged the video book into. (Below is how it appears on my computer, it should look similar.)



5. Click on the “Video” folder under the USB drive that the video book is connected to.

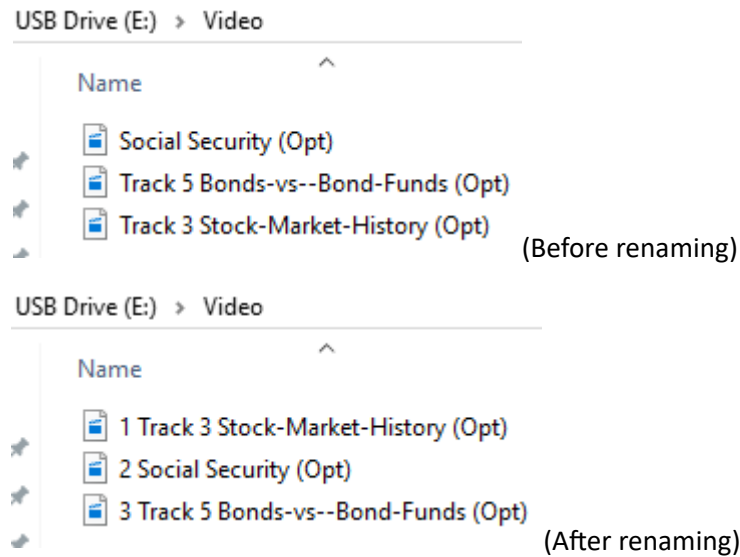


6. Make sure there are no additional files in this folder. If so, delete them.
7. Press “Ctrl” and “V” at the same time, to paste the video into that folder. (You can drag and drop the video file there, or right mouse click to paste it as well.)





8. Once you have chosen 3 animations to add to your book, you can now choose the order that they play and which button they will be assigned to. You can simply rename the file on the book by adding a 1, 2 or 3 in front of the name.



If you have any additional questions or would like to schedule a coaching call, please call Daniela Araujo at (954) 870-6717 or email her at [daraujo@advisorsacademy.com](mailto:daraujo@advisorsacademy.com)



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