



Updated 2024 Marketing Materials

We have now updated all the Workshop/Webinar PowerPoints, scripts, whitepapers, and video animations for 2024! We have also worked with Acquire/LeadJig to update all the workshop mailer campaigns. They have all our proprietary campaigns ready to launch for the new year.

The presentations and whitepapers can be branded with your logo and disclosure. Once a piece of marketing material has been branded, each item will need to be sent to the compliance department for advertising review and approval.

If you cannot add your logo and disclosure, we are happy to help! Just submit a [Marketing Order Form](#) to our team with the materials you would like, and we will brand them for you. Please remember it will typically take two weeks in turnaround time, so please do not send the MOF a few days before your workshop or event!

Workshop/Seminar Presentation Materials:

- **Estate Planning:**
 - [PowerPoint](#)
 - [Script](#)

- **Understanding IRAs:**
 - [PowerPoint](#)
 - [Script](#)

- **RMDs:**
 - [PowerPoint](#)
 - [Script](#)

- **Recession in Retirement:**
 - [PowerPoint](#)

- **Social Security:**
 - [PowerPoint](#)
 - [Script](#)

Webinar Presentation Materials:

- **Estate Planning:**
 - [PowerPoint](#)
 - [Script](#)
- **IRA/401K Mistakes:**
 - [PowerPoint](#)
 - [Script](#)
- **Social Security:**
 - [PowerPoint](#)
 - [Script](#)
- **RMDs:**
 - [PowerPoint](#)
 - [Script](#)
- **Taxes:**
 - [PowerPoint](#)
 - [Script](#)

2024 Updated Reports/Whitepapers:

1. [10 Signs You're Working with a Retirement Income Specialist](#)
2. [7 Risks to Your Retirement](#)
3. [Annuities: Income for Life](#)
4. [Are Your Allocations Right for RMDs?](#)
5. [Are Your Allocations Right for Social Security?](#)
6. [Bonds vs. Bond Mutual Funds](#)
7. [Building Blocks of Retirement](#)
8. [Don't Let Long-Term Care Be Your Financial Blind Spot](#)
9. [Estate Planning Myths](#)
10. [Guide to Aging](#)
11. [Hard Lessons of the Stock Market](#)
12. [How Much Do I Need to Retire?](#)
13. [How to Give and Receive Charitable Contributions](#)

14. [Importance of Financial Defense](#)
15. [Introduction to the Universe of Income-Generating Financial Strategies](#)
16. [Investing for Income in the Stock Market](#)
17. [Negative Spin on Annuities](#)
18. [Passive Income for Retirement](#)
19. [Proactive Tax Strategies](#)
20. [Protect Yourself From the Dangers of Inflation](#)
21. [Protecting Your Finances in the Age of Cybercrime](#)
22. [Retirement Risk Report: Will You Outlive Your Money?](#)
23. [Secure Act 2.0 Report](#)
24. [Surviving-Child Financial Checklist](#)
25. [Ten Warning Signs of Working with the Wrong Financial Advisor](#)
26. [The Case for Fixed Income](#)
27. [The Income Generation Report](#)
28. [TR = I+G Guide](#)
29. [Understanding and Maximizing Your Social Security Benefits](#)
30. [Understanding Price-to-Earnings Ratio](#)
31. [Understanding Required Minimum Distributions](#)
32. [Why Investing in Mutual Funds Could Jeopardize Your Retirement Plans](#)
33. [Women, Money & Retirement](#)
34. [Year-End Financial Planning Checklist](#)

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 \(“Do-It-Yourselfer” Investors\)](#)
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](#)

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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 will need a smaller version of each video. We have 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/>

Getting Started:

If you have not strategized your marketing game plan for 2024, now is the time to get started! We would be happy to conduct a quarterly marketing analysis to help build out a more targeted marketing schedule. By doing a deep dive into your metrics data, we can determine where you are getting the best return on your investment. The goal is to help you maximize your marketing budget and get you in front of the prospects you are most likely to close.

Marketing is an art, and you need to keep your finger on the pulse to know where to spend your marketing budget. By preparing yourself with all the materials and technology you need to increase your ratios, you can jump into 2024 with a head start.

To schedule a Strategic Marketing Call with our Coaching Team, please contact Daniela Araujo at daraujo@advisorsacademy.com or call her directly at (954) 870-6717.



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