



## **New Year, New Opportunities: Tactics & Messaging to Drive Action**

The new year is a pivotal time to set the tone for success and jumpstart your momentum toward hitting your goals. It's the perfect opportunity to revisit your strategies, refine your approach, and prioritize the actions that will have the biggest impact on your business.

Whether it's re-engaging with existing clients, launching new marketing initiatives, or cultivating a pipeline of quality leads, starting the year strong ensures you're building a foundation for growth and success. Remember, the effort you put in now will shape the trajectory of the entire year—so make every conversation, every meeting, and every strategy count!

To instill urgency and encourage past prospects to schedule an appointment, you can focus on time-sensitive topics that resonate with their financial concerns and goals. Here are a few ideas:

### **1. New Year, New Plan**

- **Messaging:** "The new year is the perfect time to get your finances in order. Jump into the New Year strong with a solid strategy for your retirement needs."
- **Urgency:** Position January as a fresh start to address financial goals and prevent procrastination.

### **2. Tax Planning Before the April Deadline**

- **Messaging:** "January is the ideal time to ensure your retirement aligns with your tax strategy. There may still be opportunities to maximize tax advantages for the year ahead."
- **Urgency:** Emphasize the benefits of early preparation, particularly for retirees with Required Minimum Distributions (RMDs) or taxable accounts.

### 3. Help Protect Your Retirement from Overvalued Markets

- **Messaging:** "With market valuations at historically high price-to-earnings (P/E) ratios, now is the time to ensure your retirement plan is protected from potential downturns. Let's explore strategies to safeguard your income and preserve your wealth."
- **Urgency:** Highlight the recent high market valuations and position a meeting to see how their retirement would hold up if there was a market correction.

### 4. Take Advantage of the Current Interest Rate Environment

- **Messaging:** "With interest rates still reasonably high, many retirees still have unique opportunities to secure reliable income streams and grow their savings. Don't miss out on strategies that could potentially benefit you now."
- **Urgency:** Emphasize the time-sensitive nature of interest rate-driven opportunities and how the advisor could identify whether that would be beneficial to the prospect in the Retirement Risk Report.

### 5. Preparing for the Impact of the Recent Political Transition

- **Messaging:** "Changes in leadership often bring new tax policies and economic shifts that can directly affect your retirement income. Now is the time to review and adjust your plan to stay ahead."
- **Urgency:** Highlight the potential implications of the political transition on their financial security and the importance of proactive planning.

### 6. Medicare and Social Security Updates

- **Messaging:** "Recent updates to Social Security and Medicare in 2024 could impact your income plan. Let's review how these changes affect your retirement."
- **Urgency:** Leverage newsworthy updates to capture attention.

### 7. Gain Clarity with a Personalized Retirement Risk Report

- **Messaging:** "Are you aware of the potential risks that could disrupt your retirement income? A personalized Retirement Risk Report can help you identify vulnerabilities and take steps to protect your financial future. January is the perfect time to start."

- **Urgency:** Position the Retirement Risk Report as a critical tool for uncovering hidden risks and provide a time-sensitive call to action to prioritize their financial security.

## 8. Limited Availability for January Appointments

- **Messaging:** "January slots are filling up quickly. Secure your appointment now to ensure we have time to focus on your needs."
- **Urgency:** Create scarcity by emphasizing limited availability.

## Multi-Channel Marketing

Reaching prospects through a variety of channels helps maximize engagement and ensure your message resonates with different individuals. Utilize a mix of emails, phone calls, social media, and other methods to increase the chances of connecting with prospects where they are most comfortable, leading to stronger relationships and more opportunities to convert.

### 1. Phone Calls:

- When calling prospects, highlight key benefits and time-sensitive opportunities like those above.
- Offer limited-time incentives for booking early, (i.e., Retirement Risk Report available again for the first two weeks of January).

### 2. Email Campaigns:

- **Subject Lines:** Create compelling subject lines like, "Start the Year Strong with a Revamped Retirement!" or "Maximize Your 2024 Income Plan – Let's Talk in January."
- **Body Content:** Use clear, concise language that emphasizes the benefits of scheduling early. Include a call-to-action (CTA) such as, "Click here to schedule your appointment" or "Schedule your Retirement Risk Report today to plan for a tax-smart 2024."

### 3. Text Messages:

- Keep messages short and direct: "The new year is the perfect time to review your retirement plan. Let's set up a quick meeting in January to make sure you're on track. Reply to book!"

- Texts are ideal for delivering brief, urgent prompts with a CTA like, "Schedule now before the year gets busy!"

#### **4. Retargeting Ads:**

- Use emails targeting prospects who have shown interest in financial planning or retirement topics. Focus on urgency with headlines like "Start the Year with a Strong Financial Plan" and "Book Your January Consultation Before Slots Fill Up."

#### **5. Client Referrals:**

- Ask your current clients to refer friends or family who may benefit from reviewing their finances in the new year. Mention a potential event where the client and friend can come to get an introduction to your firm.
  - [Mother Theresa Script](#)
  - [Client Referral Dinners](#)

#### **6. Personalized Video Messages:**

- Record a short, personal video (using [BombBomb](#) or similar service) that outlines the key reasons why it's important to meet with the financial advisor again or for the first time in January. Videos add a human touch and can feel more personal and engaging, and BombBomb videos in particular have GIFs to encourage clicks as well as buttons for call-to-actions.

#### **7. Social Media Posts:**

- Use eye-catching graphics and short, persuasive messages like: "New Year, New Financial Plan! Book your January appointment today to potentially optimize your strategy for 2024."
- Share success stories or testimonials from clients who have benefited from planning early (with proper disclosures).

By using a combination of channels, you can create a well-rounded approach that captures prospects' attention through multiple touchpoints. Don't wait until your events start to kick off the year. Focus on uncovering opportunities from your hot prospect list, past events, and current clients to start the new year strong.

If you would like more direction on where to start, reach out to our Coaching Coordinator to schedule a time with one of our coaches at [coaching@soundincomegroup.com](mailto:coaching@soundincomegroup.com) or (786) 723-1303.



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