

MARKETING MADE EASY NEWSLETTER

FEBRUARY 2025



STRIKE WHILE THE IRON IS HOT THIS TAX SEASON WITH THE HELP OF **BULL'S-EYE MARKETING**

Each year, tax season presents a prime opportunity for financial advisors to add value for their existing clients while also attracting scores of potential new clients. As a Sound Income Academy advisor, tax season allows you to maximize the value of several of the attraction-based lead generation tools and strategies available to you through Bull's-Eye Marketing.

Remember, as Dave explains in his new book, "Attract & Grow: The Financial Advisor's Blueprint for Attracting \$50M in Annual Assets," attraction-based lead generation isn't just about attracting leads. It's about engaging prospects in a way that fosters a genuine interest and desire to interact with your services. Our tax-based lead generation strategies are a perfect example of this principle in action because most allow you to demonstrate your value and professionalism up front in a tangible way. Done properly, this invariably fosters a desire in prospects to want to learn more about you, and about how your unique business model might further help them achieve their long-term financial goals.

With this in mind, here are some tips on how to leverage Bull's-Eye Marketing and other strategies to make the most of this tax season to attract new business.

TAX PRO

If you're already using our TaxPro system you are well aware of just how powerfully effective it can be.

While other FMOs also offer lead generation strategies built around providing a tax service, ours includes several proprietary features that make it the industry's best. In fact, TaxPro was designed specifically to eliminate the most common flaws found in other tax programs. If you're not yet using TaxPro, here are some important facts about the program you should know:

It is easy to implement and requires no tax background to use.

It delivers the lowest cost-per-appointment of any lead-generating tool in the industry.

It has a proven system for converting tax clients to long-term financial clients.

It attracts the largest average case size of any tax model available.

It includes a step-by-step process for managing growth.

It guarantees you the highest closing ratios.



TAX-BASED EDUCATIONAL WORKSHOPS AND WEBINARS

Between now and April 15 is a great time to host educational workshops and webinars that you can advertise with a focus on the valuable tax information they provide. Most people are thinking more about their taxes at this time of year, so any educational event with a tax theme is bound to get their attention. That's especially true for people in or approaching retirement who are starting to wonder about the potential tax impacts of things like Social Security, estate planning, and their Required Minimum Distributions. As you know, our workshops on these topics are packed with valuable tax tips and information you can use to first attract prospects – and then to engage them in a way that builds their interest and leads to their desire to schedule a meeting with you!

As for our educational webinars, we, of course, have scripts and slide decks available on all the topics mentioned above, in addition to webinars on "IRA and 401(k) Mistakes," "The 7 Secrets to a Stress-Free Retirement," and one specifically on "Taxes and Fees." The beauty of an educational webinar, of course, is that by offering the program online you can cast a wider prospecting net geographically.

GUEST SPEAKERS

Could there be an opportunity for you to give a timely presentation on one of the above topics for a local club or organization? Perhaps one of your clients belongs to such a group and could serve as your liaison to help you set it up. It might be worth looking into.



RADIO

If you're doing your own radio show or podcast, now is a great time to focus your topics on tax-related issues, and more broadly on how investing for income first and growth second can help ensure you don't end up getting blindsided by a huge tax burden in retirement.



ON AIR



TAX RELATED CONTENT

Another surefire way to make the most of tax season as a lead-generation opportunity is to make sure you're sharing valuable tax-related content through things like blogs, white papers, videos, and social media posts. Topics can include things like tax-saving strategies, deductions for small businesses, or how to maximize retirement contributions. Attraction-based lead generation is not just about attracting, it's about engaging, and providing timely, useable content of this sort is a great way to foster that engagement.

SUMMARY

Certain times of the year create unique opportunities to focus your marketing and lead-generation efforts in a way that allows you to strike while the iron is hot. Tax season is certainly one of those times, so make the most of it! As always, reach out to the Marketing Team for any guidance or assistance you need.



RICH WEALTH MANAGEMENT



MONTHLY MEGA HIT

www.richwealthmanagement.com

Dwight Rich, CFP[®], RSSA[®]

Each month we like to feature an advisor who is doing exceptional work. This month we are featuring Dwight Rich, president of Rich Wealth Management in Louisville, Kentucky. His company specializes in helping individuals develop sound retirement strategies. They offer personalized service and educate their clients about financial concepts and products. Rich Wealth Management strives to take the mystery out of investing, insurance, estate conservation, and preserving wealth.

Primary Coach Rick Bates had this to say:

"Since Dwight has joined us, he has been voraciously studying and using the Simplified Sales Process. Due to his persistence and patience, he earns this month's Megahit!"

Well done, Dwight, and best wishes for your ongoing success!