

MARKETING MADE EASY

NEWSLETTER

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USE THE RETURN OF MARKET VOLATILITY TO YOUR ADVANTAGE IN YOUR **MARKETING EFFORTS**

After a long stretch of relative calm, volatility has returned to the financial markets. It's not really a surprise, since the markets often tend to get nervous when a new presidential administration takes over. That's especially true if the new administration starts doing things that take investors by surprise. For instance, the stock market sank quickly in January when the White House announced its plan to impose new tariffs against China, Mexico, and Canada, and fears of a trade war have persisted ever since.

The point is that volatility is likely to continue, and it's all happening at a time when most people are already more focused than usual on their finances.

They're thinking about things like taxes and their New Year's resolution to get serious about retirement planning this year. That typically makes the period between now and early summer a productive one for financial advisors, but this year has the potential to be more productive than ever if you effectively use volatility to your advantage.

TIMELY MESSAGE

Doing so starts with your marketing.

Since people are more focused on their money right now, in the current climate they're likely to be doing so with at least a tinge of nervousness. They're wondering how bad this volatility might get and what it could mean for their investments, their retirement goals, their future tax burden, and their plans for taking Social Security. The list goes on.



In short, retirees and those near retirement are looking for answers, and as an Income Specialist, you have precisely the expertise and the answers they need. So, make people aware of this when marketing your dinner seminars, educational workshops, online webinars, and other prospecting events. Use the current climate of uncertainty to make the marketing around your events timely and compelling. Pose questions that are probably already on the minds of many older Americans, such as:

- Is another major market downturn brewing?
- Is your retirement safe from potential market risks?
- Are changes coming for Social Security?

Of course, no one can answer any of these questions concretely. No one has a crystal ball. But we certainly do address these topics (volatility, risk tolerance, Social Security, etc.) in our seminars, workshops, and other educational events, and we're able to provide important information and perspectives that can help people make good decisions.



Remember, too, that in Dave's AIDA formula for growth and success, the lead-generation process is all about fueling the prospect's desire to work with you.

FUEL THEIR DESIRE

You've already attracted them by being differentiated as an Income Specialist. You've already piqued their interest with your branding. Now it's time to build and nurture their desire to meet with you. Making your presentations and your marketing around them relevant to current events and conditions as much as possible is a great way to do just that, especially in times of change and market uncertainty.

That's exactly why our Bull's-Eye Marketing strategies are turnkey on the one hand, but also flexible enough to enable you to tie the valuable information you're sharing to current issues and headlines.

A great example of this is our most recently developed workshop and webinar, "The 7 Secrets to a Stress-Free Retirement."

The workshop addresses, in a variety of ways, the potential dangers of market volatility for older investors who haven't shifted their strategic focus from growth to growth-first, income second. It also clearly demonstrates the potential organic growth opportunities volatility can create for investors who have made this shift. It also instills urgency with a message about the potential danger of waiting until it's too late – a message that can resonate powerfully when the markets are showing signs of increased volatility!

Of course, these same issues are addressed and can also be presented and marketed in powerfully timely ways with our other workshops and seminars, including:

- **The Importance of Estate Planning**
- **Maximizing Social Security**
- **Preparing for RMDs**
- **Taxes and Fees**
- **Understanding IRAs**



GET CREATIVE

Now is also a good time to get creative and look for opportunities to use some of our other Bull's-Eye Marketing strategies to attract and educate potential new clients about how our income model can help them feel less stressed and more confident during times of market uncertainty.

Strategies such as offering your services as a guest speaker for a local club or organization whose members would probably welcome your expert perspective on today's markets. Or looking for opportunities to provide financial literacy training for a local company that would like to offer it to their employees but doesn't have the resources to do so in-house. You can also obviously use today's market uncertainty to great advantage whenever you're using the "Mother Theresa" Referral Process.



In addition to marketing, it's also important to leverage volatility urgency wherever possible when meeting with prospects or clients and using the Sales Process. Doing so will not only help you make the most of current conditions to help grow your business, but it will also ensure you're doing all you can to help clients and prospective clients do all they can to protect their assets and achieve their retirement goals!

As always, reach out to the Marketing Team for any guidance or assistance you need.

