

MARKETING



MADE EASY NEWSLETTER

JUNE 2025

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MASTERING THE MODERN PRACTICE

Top advisors share success stories and secrets at epic SGOS 2025.

A perfect setting, timely topics, powerful presentations, and plenty of fun made SGOS 2025 one of the most acclaimed events yet. Held at the Ritz-Carlton Reynolds in Lake Oconee, Georgia, this year's focus was "Mastering the Modern Practice," with attendees especially valuing real strategies and the tools shared by top advisors.



FROM ONE ADVISOR TO ANOTHER

We encourage peer-to-peer coaching and sharing best practices. Our customizable strategies mean innovations that work for one advisor often benefit others — making these presentations especially valuable:

- [Partying Your Way to Success: Why Client Events Will Increase Revenue and Client Retention](#) by Michael Stewart.
- [Retirement Income, Ready for Broadcast](#) by David Wright.
- [From Advisor to Icon](#) by Jeff Small.
- [Closing Virtually](#) by Sam McElroy.
- [Illuminating Connections: The Power & Design of Analogies](#) by Matthew Johnson.
- [Building a Tax/Accounting Practice in Your Advisory Practice](#) by Michael Eastham.
- [RRR Sales Gameplan](#) by Jay Carrier.
- [A Winning Business Culture is the Secret to Success](#) by David Stearns.

CELEBRATING SUCCESS

This year's SGOS blended valuable education with fun and connection — from the kickoff party to the Awards Ceremony honoring Lindsey Cotter and Nathan Cox as Advisors of the Year!

Check out the [SGOS 2025 Photo Gallery!](#)



Meet David McAdams, our [Monthly Megahit](#).



Want to attend [next year's SGOS](#)? Contact our Coaching Department to learn how to qualify!



WHAT'S HAPPENING

Catch last month's highlights and this month's must-knows.



- **5/15:** Eric Lutton appeared on CNBC. Click [HERE](#) to watch.
- **6/3:** David Scranton recaps SGOS 2025 and highlights top advisor strategies in his recent SIA Update Video. Click [HERE](#) to watch.
- **6/15:** Happy Father's Day to all our Sound Income Academy advisor dads!

More and more of our top advisors are joining the Retirement Income Source® franchise — and for good reason. It helps set them apart as true Income Specialists while aligning them with a growing, trusted national brand. A differentiated business model and strong brand identity are key to attracting attention and interest, just like Dave explains in his AIDA formula from [Attract & Grow](#).

RETIREMENT INCOME SOURCE®

Stand out with a trusted brand and become the go-to income expert for your clients.

Even Dave himself rebranded his Scranton Financial Group as [Retirement Income Source® SFG](#) earlier this year. And our Advisors of the Year, Lindsey Cotter and Nathan Cox, are co-owners of [Retirement Income Solutions, LLC](#) — one of our most successful RIS-branded firms in Tennessee. The momentum is building. Are you ready to take the next step?

Joining RIS more recently are advisors Jeff Small, Don Avgerinos, and Rory Richard. Congratulations to all!



NO GUESSWORK, ALL GROWTH

We make the transition seamless and exciting.

Making the transition is easy with the help and guidance of our Marketing Team. In addition to providing a complete branding package that includes logos, website & [social media updates](#), and press releases, they'll help you market the transition in a way that not only educates clients but generates excitement.

Contact our team today to get started!



COACHING SNAPSHOT

Summer events can sizzle

Although summer can be a tougher season for live events, that's not always true. [Coaching Metrics](#) show some advisors actually see higher attendance during summer! So enjoy the season — just don't write off live prospecting!

Full service life insurance division

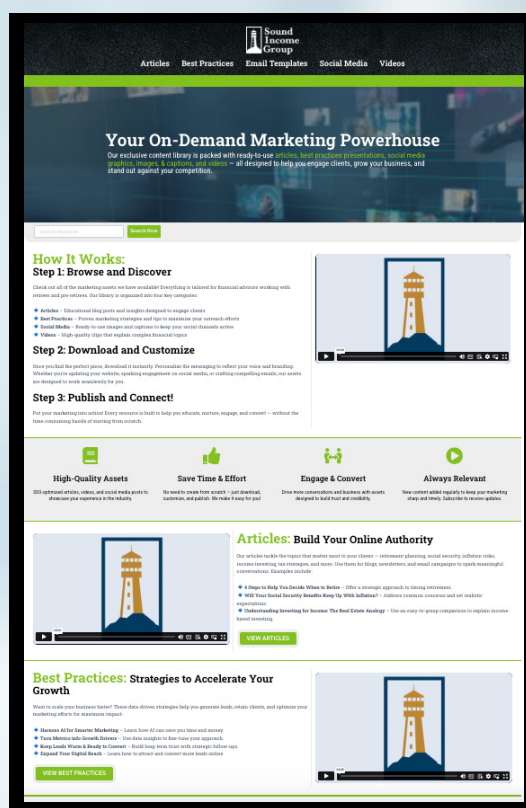
Our new in-house Life Insurance Division, led by Dan Sheehan, is here to support you with quotes, case design, [underwriting](#), long-term care, and disability planning. As Dan says, "From the simplest matter to the most complex, our commitment is to be proactive, responsive, and timely in everything we do."

MARKETING TOOLKIT

Unlock powerful marketing tools with our new content library.

The new [Sound Income Group Content Library](#) is here! SIG advisors now have full access to a curated collection of ready-to-use, SEO-friendly articles, videos, presentations, and more—organized into four key categories.

- **Articles:** Educational blog posts and insights designed to engage clients.
- **Best Practices:** Proven marketing strategies and tips to maximize your outreach efforts.
- **Email Templates:** Ready-to-send messages for every occasion.



- **Social Media:** Images and captions to keep your social channels active.
- **Videos:** High-quality clips that explain complex financial topics.

Once you find the right piece, download it instantly and tailor the message to fit your brand. New content is added regularly to keep your marketing fresh and relevant.

Reach out to the Marketing Team if you need help or have questions!