

MARKETING

MADE EASY NEWSLETTER

OCTOBER 2025

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Turn Deadlines into Opportunities

Take Aim at RMDs

As the year-end deadline for taking RMDs approaches, it creates a natural opportunity to engage with prospects who need help navigating the complexities of tax-advantaged retirement. Here are some ways to leverage RMDs in your Q4 marketing:

■ **Workshops and Webinars**

Use our ready-made mailers, presentations, and scripts to host engaging events in-person or online.

■ **Lunch & Learns**

Schedule and host an RMD-themed Lunch & Learn with a few clients and high-quality prospects.

■ **Financial Literacy Programs**

Partner with HR departments to meet education quotas and gain referral streams.



■ **Email Blasts**

Send targeted email campaigns to inform prospects about RMD deadlines and potential tax strategies.

■ **Follow-up With Strong Leads**

RMDs create a timely reason to re-engage strong prospects and highlight efficient strategies.

■ **Guest Speaking Opportunities**

Use RMDs as the topic at local events or groups eager for guidance on retirement planning.

The Power of Year-End Planning

Tips to Maximize Your RMD Meetings

As the year ends, RMDs are more than a client obligation — they're a chance for business growth. With the right approach, a compliance conversation can become a powerful year-end planning opportunity. Here are four ways to make it happen:

Conduct a Year-End Review

Use the RMDs appointment to review the client's plan, evaluate performance, and make adjustments before year-end.

Explore Investment Opportunities

Identify outside accounts or assets you don't manage to uncover new planning opportunities and consolidate finances.

Assess IRAs and Income Sources

Discuss other retirement accounts and emphasize taking withdrawals from interest and dividends, not principal.

Plan for Insurance and Reinvestment

Review insurance needs and explore ways to reinvest distributions to keep money working efficiently.

Team Member Spotlight

Steven Archer, Chief Growth Officer

We are excited to welcome Steven Archer as the new Chief Growth Officer for Retirement Income Source®. With more than 30 years of experience in the financial services industry, Steven brings proven experience, strong leadership, and an income-focused approach that will be a tremendous asset to our team.

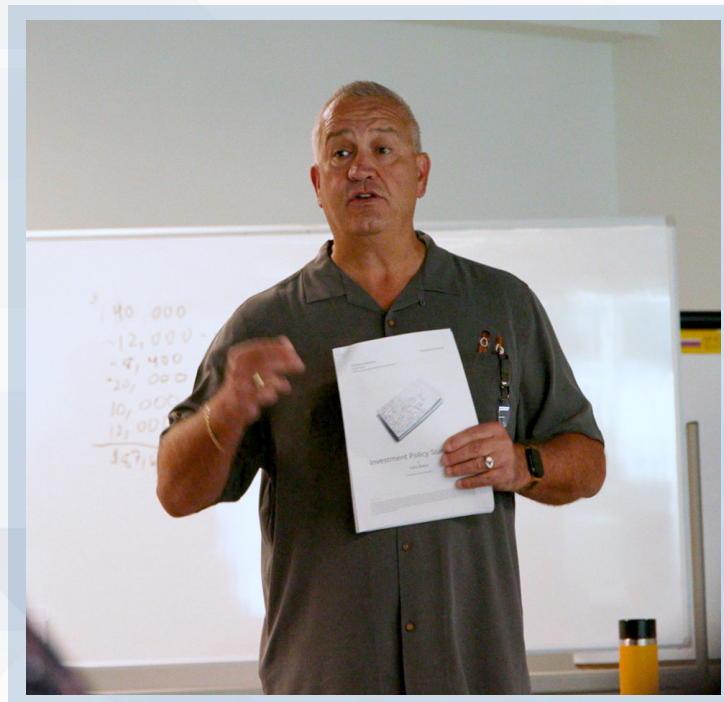
We're thrilled to have him on board and optimistic about the fresh perspective and growth he will contribute as we continue our mission to help clients achieve clarity and confidence in retirement.



Coaching Snapshot

Advanced Sales Academy

What an amazing turnout at this year's ASA quarterly event in Fort Lauderdale. Advisors came together to master advanced income strategies, sharpen practice management, and build sales skills. **A special thank you to Anthony Saccaro, president of Providence Financial & Insurance Services Inc.**, whose presentation added incredible value and insight, making the event even more impactful.



Marketing Toolkit

RMDs Client Service Tips

For client service advisors, reminding clients aged 73 and older about their RMDs is a critical responsibility, and should be done well in advance of the December 31 deadline. It's best to use a variety of channels, including:

Email Alerts

Send personalized emails outlining the importance of RMDs and the coming deadline.

Phone Calls

Direct communication helps ensure that clients are aware and can ask any immediate questions.

Automated Notifications

Utilize CRM systems to trigger reminders based on client age and account types.

Client Educational Workshops

Consider hosting a small educational event on RMDs for relevant clients.

Remind. Educate. Support.

- [RMDs Workshops](#)
- [Are Your Allocations Right for RMDs White Paper](#)
- [RMDs Analysis CTA Flyer](#)
- [RMDs Analysis CTA Infographic](#)
- [RMDs Video Animation](#)