MARKETING

MADE EASY NEWSLETTER

NOVEMBER 2025

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Year-End Momentum

Tips to Finish Strong

As the year winds down, it's important to stay focused on hitting your goals and planning for next year. Ending the year strong helps you start the new year with momentum. Here are some tips:

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You probably have your remaining seminars and workshops for the year already scheduled. Focus on bringing your A-game to each one and delivering our income message with passion and conviction.

On that note, if you haven't yet used our new 7 Secrets to a Stress-Free Retirement Seminar, watch Dave's October Sound Income Academy coaching video. This seminar puts our message front and center and takes a more positive approach to demonstrating our income model.

Goal Setting

If you haven't yet set your 2026 goals, put aside some time in the coming weeks to do so. Strive to set sensory specific goals. Think not just in terms of production numbers but of your overall business and your personal objectives.

Client Reveiws

The end of the year is an ideal time to focus on client reviews. Make sure your appointment scheduler is reaching out to clients this month to schedule as many reviews as possible for the coming weeks.

If you have expanded to a multi-advisor model, you're in even better shape because you can delegate client reviews, optimize follow-ups, and focus more on strategic thinking for your business.

Celebrating $4B in AUM

We're proud to share a major company milestone for Sound Income Strategies! This achievement reflects continued growth across the business, with total AUM increasing 14% year-to-date, serving nearly 13,000 households and supported by more than 120 advisors. Surpassing the $4B mark reinforces the strength of our income-first philosophy and the trust clients and advisors place in our approach.

Thank you to every member of our team for helping us reach this incredible moment — your work truly makes an impact. **Read the full press release.**

FALL STUDY GROUP 2025

Our annual Fall Study Group took place on November 10 and 11 in Fort Lauderdale, FL. Over two full days, advisors participated in interactive sessions focused on improving leadership, strengthening sales skills, and running a more efficient practice. The event provided valuable takeaways, practical strategies, and space for meaningful collaboration among peers.

This year also included a major highlight: the unveiling of the new brand direction for **Retirement Income Source®**. The reveal gave advisors an early look at what's changing, why the evolution is important, and how the refreshed brand will enhance marketing opportunities and drive long-term growth. Attendees left with a clearer understanding of what's ahead and how these updates will support their continued success.

Integrating Long-Term Care Into Client Reviews

November highlights one of the most important yet often overlooked aspects of financial and retirement planning: long-term care. As clients live longer, the need for care due to chronic illness, disability, or cognitive decline becomes more common. Long-term care insurance helps protect assets, preserve independence, and provide access to quality care options.

For our advisors and their teams, November presents the perfect opportunity to initiate meaningful conversations, especially during the client review process. Help clients understand how LTC coverage, integrated with life insurance or annuities, can strengthen the financial strategies you have helped to put in place.

Your life and annuity teams are here to help:

- Dan Sheehan (Life), (954) 487-1857
- Pat Walsh (Annuities), (954) 870-6724
- Life Division FAQs
- Client Review Overview Video
- B2C Special Report: Long-Term Care Costs Could Sabotage Your Retirement.

Marketing Toolkit

November 18 marks National Entrepreneur's Day, an observance dedicated to recognizing entrepreneurs. As independent financial advisors, we're all entrepreneurs and should always embrace that role with an eye toward growth through innovation and continuous improvement. Our goal is to lead in those efforts by giving you the tools, guidance, and support you need to reach your full potential.

This year's SGOS conference featured excellent presentations highlighting innovations, best practices, and the entrepreneurial spirit of our top advisors. They're worth another look as you seek to close the year strong and set your goals for 2026!

Resources

- A Winning Business Culture is the Secret to Success – David Stearns
- Retirement Risk Report Sales Gameplan – Jay Carrier
- Managing a Multi-Advisor Practice – Jake Betteridge
- Digital Marketing that Drives Results – Nathan Cox and Lindsey Cotter
- More Presentations