

FREE RESOURCES!

REMINDERMEDIA.COM/RESOURCE-LIBRARY

**FREE E-BOOK
DOWNLOAD**



Guide to Cold Calling
THE TECHNIQUES NEEDED TO CLOSE MORE DEALS

ReminderMedia logo and contact info are visible on the cover.

**FREE EBOOK
DOWNLOAD**



SOLVING THE FAMILY ISSUE
A GUIDE TO EFFECTIVE COMMUNICATION WITH YOUR CLIENTS

ReminderMedia logo is visible on the cover.

**FREE E-BOOK
DOWNLOAD**



From Anonymous to Advocate

ReminderMedia logo is visible on the cover.

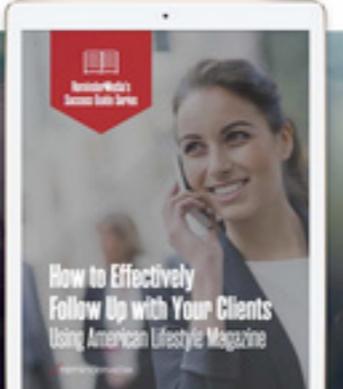
**FREE
SUCCESS
GUIDE** 



How to Build, Grow, and Segment Your Mailing List
for American Lifestyle Magazine

ReminderMedia's Success Guide Series logo is visible.

**FREE
SUCCESS
GUIDE** 



How to Effectively Follow Up with Your Clients
Using American Lifestyle Magazine

ReminderMedia's Success Guide Series logo is visible.

**FREE
SUCCESS
GUIDE** 



Promotional Copies
The Secret Weapon in Your Marketing Arsenal

ReminderMedia's Success Guide Series logo is visible.

**FREE
DOWNLOAD** 



NEW CLIENT ROAD MAP

A checklist-style document with various steps and checkboxes.

**FREE
DOWNLOAD** 



PLEASE SIGN IN HERE

A document with a sign-in form and a decorative plant in the background.

**FREE
DOWNLOAD** 



THE GREATEST FORM OF FLATTERY IS A referral.

A referral card with a photo and text: "SEND YOU A GIFT CARD" and "Please send referrals".

WEEKLY CONTENT ON OUR BLOG

REMINDERMEDIA.COM/BLOG



Take Note of These Memorable Client Appreciation Ideas



Don't Let Negative Customer Testimonials Damage Your Reputation



Capture This: The Benefits of Video Testimonials



Tips for Your End of the Year Marketing Plan



High Activity Equals Low Anxiety – Low Activity Equals High Anxiety



Learn to Embrace Rejection



Here's How You Can Be the Ultimate Problem-Solver



The Significance Your Hobbies Play in Your Career



Don't Let Sales Objections Get the Best of You



Don't Make These Common KPI Mistakes



Measuring KPIs at Every Level



The Most Important KPIs to Pay Attention To

NEW VIDEOS EVERY WEEK!

YOUTUBE.COM/REMINDERMEDIA



How to Generate Referrals

WITHOUT ASKING



LUKE ACREE

President, ReminderMedia



BILL GOOD

Chairman, Bill Good Marketing





Bill Good Marketing

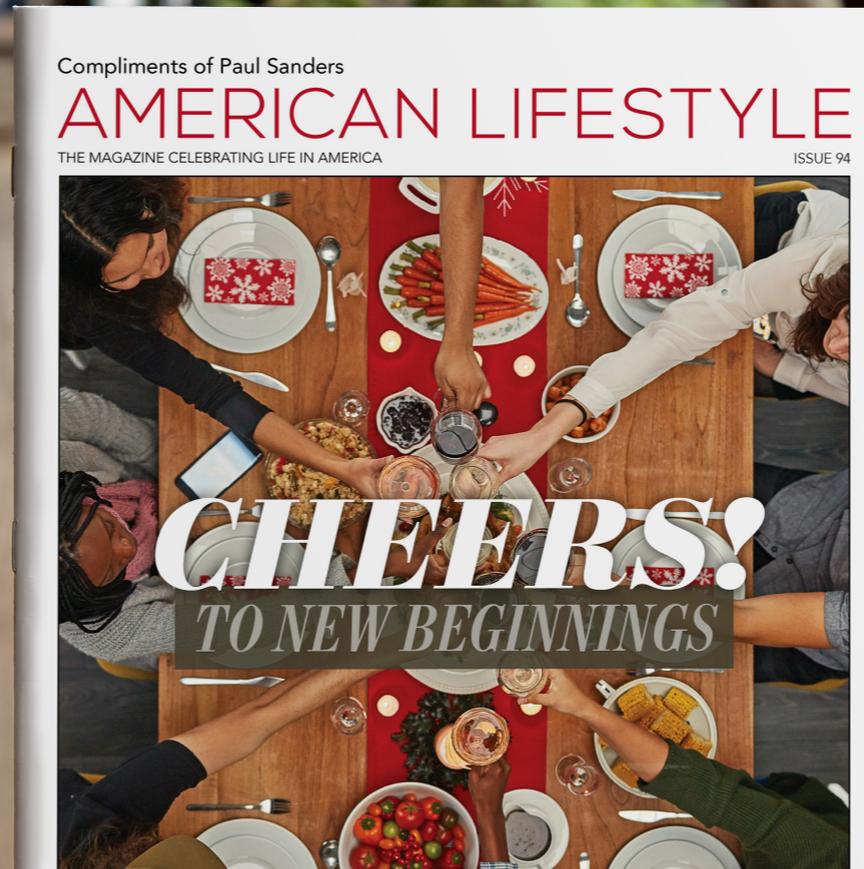
The Illusion of a Referral Solution

- 44 different tools to ask for referrals!
- A “Referral Tsunami” of names for you to follow up with.
- The Referrals “Board of Advisors”
- Referral Boot Camp
- Referral Academy
- Referral Summer Camp



ReminderMedia

- Pioneer in relationship marketing for service-based sales professionals.
- Ultimately to empower clients to close more deals and retain more business.
- High-quality marketing tools like American Lifestyle magazine help clients garner repeat and referral business.



About the Magazine

- Mailed bimonthly to the contact list you provide.
- Beautiful, full color, 48-page coffee-table-quality publication.
- Easy to customize and maintain.
- 38 percent of readers have made a referral because of the magazine.*

*2016 GfK Reader's Survey

GENERATE REFERRALS

**TOP
OF MIND
AWARENESS**

**CREATE WORD
OF MOUTH**

**REFERRAL
CONSCIOUSNESS**

Top of Mind Awareness

- The thought that occurs first when presented with a category.



Top of Mind Awareness

- A subconscious thought that is always there and produces the first mental recall in a category.
- Live in your clients' minds.



Top of Mind Awareness

- Communicate by letter, email, and social media frequently enough to ensure that advisor top-of-mind awareness is created and sustained.
- No Contact Report maintained at 10 percent or less for clients.



Dear Bill and Judy,

Spring has arrived, and so has spring cleaning. To mark the occasion, we are offering our first ever Shredding Day! If you have any old or outdated documents that need to be shredded, please join us on March 3. We will have a mobile shredding truck on site shredding all the documents you can bring.

But wait! There's more. We here at Sanders Wealth Management don't believe spring cleaning should have to be a chore. That's why we're also featuring door prizes, coffee, and delicious donuts for everyone who attends. What better way to spend a Saturday morning than with good food, good friends, prizes, and a giant shredder?

Spring cleaning is about to get fun. The event will be March 3 from 12-4 at Bryant Park.

Have a friend who might be interested in our shredding service? Feel free to invite them as well! We would love the opportunity to meet them.

Thank you,

Paul Sanders



Paul Sanders
Private Wealth Advisor

Direct: (866) 458-4226

Fax: (610) 878-2000

Email: info@remindermedia.com

www.remindermedia.com

INNOVATION
LEADS TO

Use the Inside Letter of Your Magazine

- Tailored to the content in each specific issue.
- Fully customizable down to the individual recipient.
- Use Bill Good's letter templates from his library.
- Bonus: Use social shares to post on social media.

Create Word of Mouth

"If you do build a great experience, customers tell each other about that. Word of mouth is very powerful."



JEFF BEZOS
CEO Amazon





Events

- Invite well-connected clients to a birthday lunch or dinner.
- Schedule frequent client-guest educational seminars.
- Honor special clients with special events.
- Invite like-minded clients to events about which they are passionate.
- Once a year, invite every client to an appreciation event.



Unique Event Tool

- Customize the magazine for your event.
 - Customize the letter.
 - Turn the Tear Out Card into a coupon.
 - Showcase event takeaways on the back cover.
- Use as a party favor and follow up.
- Make a recipe for the event.



Referral Consciousness

■ Solve This Problem First.

■ The state of mind of a client that causes the client to give you the name of a friend or associate who needs financial advice.

Promote Referrals

- Give a gift that encourages more referrals.
 - Referral basket
 - Customized magazine
- By phone or in person.



Use American Lifestyle to Promote Referrals

- A gift sent six times a year.
- Use the articles as your reason to call.
- Use the inside letter as your referral letter.



RECAP

TOP OF MIND AWARENESS

Customize the letter of
American Lifestyle.

CREATE WORD OF MOUTH

Plan a variety of events.
Customize the magazine
for events.

REFERRAL CONSCIOUSNESS

Use the magazine as a gift.
Use the magazine as
a reason to call.

WEBINAR DEAL

NEW CUSTOMERS

When you sign up get 15 free magazines to use at your event.

CURRENT CUSTOMERS

Add to your mailing list and we will pay for half (up to 20).

BILL GOOD

Free 2 year marketing plan for advisors.



Questions & Answers

- Type your questions in the question box!



Thank you for listening

Recorded session and slides will be emailed to you.

 @ReminderMedia |  ReminderMedia |  ReminderMedia |  ReminderMedia

 Bill Good Marketing |  @BillGood01 |  Bill Good Marketing