EMAIL CORRESPONDENCE #1

Hello again Mr. or Mrs. Smith,

I've tried to reach you by phone and email and I've not heard back from you. Perhaps if I introduce myself you'll be kind enough to return my call or email.

I am a “safe money” specialist and for 18 years I've specialized in principal protected and tax advantaged accounts designed to provide income, either taxable or tax free, for the rest of your life. Safe money is not PART of our business. It is all we do. We have a national team of experts who are in the top 1% of annuity producers and retirement income planners nationwide. We have been in the indexed annuity business since it began in 1995 and we have relationships with the original designers and current financial engineers on the leading edge of this changing industry.

We recognize that you can buy annuities many places and over the last two decades we've developed resources and relationships that set us apart from the banks, brokerage firms, and independent advisors in our marketplace as follows:

• a database of over 600 annuities to show you ALL the annuities available that fit your needs...not just the ones approved by our employers
• performance modeling software developed by actuaries that will show you the real historical performance of a particular product rather than claims made by salespeople and marketing departments
• access to proprietary products and strategies not available through the banks, brokerage, and independent advisors...available to us by virtue of our size, relationships, and tenure in this business
• product and tax strategies that improve returns 10 to 25% over the same product used by the average “street” agents
• direct access to insurers with special terms for cases in excess of $1 million.

I know you're busy and perhaps enough time has passed that you're no longer even interested. Please give me the courtesy of a call or return email so we can either continue this conversation or I can focus my efforts on others who do want to work with me and my team.

We wish you the best.

Kindest regards,

Trusted Advisor

Email Signature
EMAIL CORRESPONDENCE #2

Dear Mr. or Mrs. Smith,

Thanks for requesting information on annuities. I look forward to helping you find the solution that is best suited to your needs.

To that end, I’ve tried to reach you by phone and have yet to make contact. I’d like to spend a few minutes talking about your specific interests so I can send you the appropriate information. Kindly return my email and let me know what time is best to call. Alternatively, of course, you may call my office and try to catch me or just leave a message with a good time to call you back.

Kindest regards,

Trusted Advisor

Email Signature

EMAIL CORRESPONDENCE #3

Mr. or Mrs. Smith,

I was given your information for your request for an annuity report. I would like to contact you to verify your information and ask you two quick questions in order to begin the process of customizing your report. Please let me know when is a convenient time to for me to contact you.

Thank you. I look forward to speaking to you.

Kindest regards,

Trusted Advisor

Email Signature
EMAIL CORRESPONDENCE #4

Dear Mr. or Mrs. Smith,

My name is Advisor’s name, a Certified Financial Planner. Recently you received an email introducing me as the advisor that will customize your Annuity Rates Report. Since you have company this week, I have been asked to contact you next week. When we connect we will try to set an appointment to do a “join me” meeting on the phone and the computer. This is very exciting, as it allows you and I to customize your report based on your goals and objectives. You will have an opportunity to learn more about annuities, and to have any questions you have answered as well. This meeting will also allow me to collect enough information from you to make the report specific to your needs.

Below is my contact information. I will contact you early next week. In the meantime, if you need me for anything, please give me a call. Cell is my favorite number. Especially next week, as I have some continuing education classes I will be attending out of the office. I am looking forward to speaking with you and hope you have a wonderful time with your company.

Best Regards,

Trusted Advisor
Email Signature
EMAIL CORRESPONDENCE #5
Dear Mr. or Mrs. Smith,

I am glad we connected this morning regarding your desire for a Customized Annuity Rate Report. I also got the message that my call was at an untimely time. You indicated that you have my contact information, and will call me in the event that you want assistance.

I thought you might like to have some additional information on me. My website is below. I literally specialize in Income Planning. I am a Certified Financial Planner that is not married to any particular product or Insurance carrier provider. As a result, you will get the most comprehensive and thorough report that is unbiased and customized to you. The way we are able to do this is we set up a “join me” meeting over the phone where I share with you my computer screen. I walk you through an educational conversation about things that are good and bad about annuities in general. I also educate you on the various pros and cons of various features available in the marketplace. You have the opportunity in this meeting to ask any questions you have and to get them answered. From this meeting, I am able to weed out the unnecessary annuity options and narrow down your search to the best options given your circumstances.

The report will be completely objective and educational in nature. I want to encourage you to give me a call or shoot me an email as to when we can talk. It is easy to accidentally make the wrong decision by not getting personal assistance. There is no fee for this service from me. In the event that you do purchase an annuity however, I would like to earn the business. The best number to reach me at is cell. It too is listed below. I am travelling next week for continued education meetings to keep me smart. However, I will have voice mail and email access. Looking forward to being of service.

Sincerely,

Trusted Advisor
Email Signature
EMAIL CORRESPONDENCE #6

Good Morning Mr. or Mrs. Smith,

My name is Advisor’s name, a Certified Financial Planner. On August 7, 2014, I believe you received an email that introduced me as the advisor who can generate your customized Annuity Rate Report. In order to do this effectively, we need to have a brief conversation. This will allow you the opportunity to learn about Annuities in general and to get any of your specific questions answered. In addition it will help me to get enough information to generate a report that meets your goals and objectives. The report will be far more helpful if we weed out the material that is not appropriate for your consideration. There are so many products and carriers to select from, our conversation will help me to learn what is important to you beyond the obvious...income that lasts forever.

My email address is Advisor@AdvisorCompany.com and my phone number is cell 408-555-5555. Will you please email me or call me so we can arrange a time to have a conversation? Some additional information about who I am is provided on my web page provided below. Having been in the income planning business for 30 years, I am delighted to help you get the correct information needed to make the best decision for your goals.

Tried to call you at 408-555-5555 which was the number listed on the contact information I have for you. Apparently it is incorrect. It would be great to also have a number for you, in the event you do want me to ultimately call you. I look forward to being of service.

Sincerely,

Trusted Advisor
Email Signature
Hi Mr. or Mrs. Smith:

This is Advisor’s name again. On August 6th you requested that someone reach out to you to help you get some desired information on annuities. I was to call you the next morning, which I did several times. In addition, I followed up by email.

Today I called you and left a message on your 480-555-555 number.

Since I initially reached out to you, I have been traveling to keep up my knowledge (for continuing education). I am back and ready to share with you all the things you need to consider before selecting the proper investment vehicle.

From our conversation, I will be able to prepare your customized annuity rate report that you wanted and I will be able to answer all your questions. There are some brand new programs that are great for the right person that are new to the marketplace. Looking forward to speaking with you. Please call me back. Cell is my preferred number. You can also email me if you prefer.

Thank you,

Trusted Advisor
Email Signature
EMAIL CORRESPONDENCE #8

Good morning Mr. or Mrs. Smith,

My name is Advisor’s name, a Certified Financial Planner. Yesterday, I believe you received an email introducing me as the person who can prepare the Customized Annuities Rate Report for you. In order to do this effectively, it is important that we arrange a time to speak with each other. Your report will be customized and specific to your particular goals and objectives. It will also allow for you to get the information you want without burdening you with information that is of no value to you.

Can you please advise me on when would be a good time for me to contact you so that we can arrange a telephone/join me meeting? Ideally I would love to speak with you sometime today (after 10 a.m.) to arrange a ‘join me” meeting for tomorrow. The join me meeting will allow you to learn more about annuities, get your specific questions answered, and provide me with enough information to generate you a customized report that will fit YOU without over burdening you with unnecessary information.

Please email me the time I can call to set up the meeting or call me on my cell phone or office line to arrange for the time. My contact information is below. Looking forward to being of service.

Sincerely,

Trusted Advisor
Email Signature
Hello Mr. or Mrs. Smith:

This is Advisor's name, (insert designations here). I am back in town and as promised am reaching out to you to set an appointment. We spoke the week before last, when I was in Phoenix for training. Last week I was still in training, but this time it was in Dallas. Both were great meetings. I tried to call you today and the machine asked me to email you instead.

Please email me or call me at 408-555-5555. I realize that our initial meeting was supposed to be to provide you with a customized annuity rate report. That, I am still prepared to do once we have our initial meeting. However, when we spoke you mentioned some hesitation on having interest in annuities due to your worry regarding liquidity of the products generically speaking (mind you, there are many types and this concern can be addressed which is one of the reasons we need to talk before the report is produced). You also mentioned the desire to do more research on the internet. I also know you are very busy with your own business, and the internet is sometimes a reliable resource but often times not. I am able to help you determine what is correct information and what is not. In addition, I can answer all questions and assumptions and provide the backup needed to support your specific concerns based on your goals and objectives. As a matter of fact, based on our meeting, I will be able to likely advise you on what would be the most effective ways to reach your goals which may or may not include annuities in your portfolio.

What I recommend we do is to sit down either in person or over a “join me” meeting over the internet (I would love to meet in person since you are two blocks from me), and simply evaluate what options are available in the marketplace to help you reach your goals and the various pros and cons for each option. Although I was referred to you as an annuity expert (which I am), I am also a Certified Financial Planner. The reason I was referred to you is because of the care that I take to make sure that any financial investment decisions are made with the best of due diligence on my part as well as yours.

Please advise me of when we can have our initial meeting. I want to learn more about what you do as well.

Thank you. I will also try to reach you by phone tomorrow afternoon in the event I have not heard from you.

Sincerely,

Trusted Advisor

Email Signature
EMAIL CORRESPONDENCE #10

Mr. or Mrs. Smith:

Thank you so much for your response. I see I am not the only one working so late! What I will do, if ok with you, is add you to the back of my website so you can be included in my newsletters. They come out every couple of weeks and are great regarding the financial strategies we all need to consider when making investment decisions and really doing any financial planning for ourselves. You can unsubscribe at any time. But, would love for you to explore them a bit because so many people spend more time doing anything than planning their financial future.

I love more than anything helping people become comfortable with their investment options and questions such that they can make the best decisions for themselves. Our introduction was from a site that you requested information on back at the beginning of August on annuities. In order to produce a report that is meaningful to you (versus generic to all and not specific to your needs or objectives), the company you approached online tried to contact you for more specific information. The company you requested the information from was unable to reach you, when they called your number that you provided. They asked me to follow up as I am actually the one that provides the reports based on the details of what you are trying to accomplish and your specific goals.

I really appreciate your getting back to me. It will allow me to also advise them of what the status is regarding the report I was supposed to generate. In the meantime, should you have questions...I am delighted to be of service. In addition, based on your age, I imagine there might be some areas that I could help you think about that you might be overlooking. I have 30 years of experience as a Certified Financial Planner. Due to the interest you had online, you have access to me for an initial financial planning session at no expense to you. This appointment was designed specifically to address your annuity report that I was to customize for you based on your goals. In the event you would like to proceed with the appointment, I am happy to customize it to address any financial planning questions you have or to listen to your goals and objectives and make suggestions on your next steps to your personal plan.

I encourage you to give consideration to taking me up on this offer. The pleasure would be mine. Again, thank you for the response. Let me know!

Sincerely,

Trusted Advisor
Email Signature
EMAIL CORRESPONDENCE #11

Hello Mr. or Mrs. Smith:

This is Advisor's name, a Certified Financial advisor. Happy Labor Day Weekend! I want to apologize for waiting to write to you. The number you provided for contact appears to ALWAYS be a fax line versus a land-line. We have tried to call several times. In order to give you the requested customized annuity rate report, it is important that we spend some time evaluating what you are trying to accomplish. There are numerous types of annuities and they can be designed with specific goals in mind. I want the report to take into account your unique financial circumstances based on the feedback you give me in our “educational platform” conversation. I am basically an expert where annuities are concerned (which is why your request was sent to me). Basically, we talk to address your questions and for me to gather information to generate the appropriate annuities that are selected based on your goals.

Do you have a number that you will share with me so I can call you? I am in town this weekend due to work demands. I am happy to work on this report for you too, but we have to speak first. Also, please feel free to ask me anything regarding annuities. There is a lot of misinformation out there on how annuities work and what are their advantages and disadvantages. As a result, it is important to get your information from an expert. Many times articles use the term annuity as if it were speaking of all of them, when indeed that is far from the truth. We select the features based on the client’s needs and goals. Therefore, let me help you with your questions and your analysis of options that I will hand select for you based on our conversation.

Sincerely,

Trusted Advisor

Email Signature
EMAIL CORRESPONDENCE #12

Hello Mr. or Mrs. Smith:

On August 18th, you requested some information on annuities. During the past few weeks I have been traveling for numerous continuing education classes (I am a Certified Financial Planner). Therefore, I apologize for just now reaching out to you. You were referred to me, by an online resource that assists the public in selecting the best annuities for their particular needs and circumstances. When I called the house today, I spoke with your wife. She is pretty sure that you have gotten an annuity. She mentioned that it is likely a Vanguard annuity. That sounds like a variable annuity.

Anyway, I am offering to have the contract reviewed for you, and to provide a second set of eyes to help make sure you made a wise decision. There are numerous types of Annuities and ways to design them. As an expert in the field, a review will be easy for me to provide. All annuities offer what we call a “30 day free look from the delivery date”. This is because our industry wants to give the customer the opportunity to confirm the best decision was made after they review their contract.

If indeed your contract is a variable annuity, I have attached some of the items that will be reviewed that you will want to be aware of in the contract. If it is some other type of annuity contract, the review will be slightly different. But more importantly, I need to review what you were trying to accomplish with the product. It is important for us to have to have a discussion regarding the goals you have for the program you selected. Based on the annuity review and the discussion of what you were trying to accomplish, I can help you make sure you made the best decision for what you were trying to accomplish.

I left my cell phone for you with your wife. Here it is again: 408-555-5555. Below is my website where you can read more about me and who I am, I come with 30 years of experience and am a Certified Financial Planner. After we talk, I can have the report back to you within 24 hours or so. The report will either confirm you are all set or make recommendations for a more appropriate approach and substantiate the “why.” I am not some pushy sales person, so you will not have to worry about me being anything other than up front and honest. The report will be completely objective.

At worst, I feel certain you will know far more about your selected program than you do now. Better to learn now during the free look period than when changes are not allowed. I am actually working all weekend. So feel free to call me on cell. Again, I am sorry for the delay in response and I look forward to being of service should you take me up on my offer. I am going to share one more article in a separate email. Hope it is helpful!

Sincerely,

Trusted Advisor

Email Signature