Book Access

How to Gain Access to Patrick Kelly's Books

Select the **Simplicity Book Resources** button inside the Going Virtual Lead Generation section in Connect to order books.

Book Summaries



STRESS-FREE RETIREMENT (Annuity Focused)

Nearly every person who reads this book wants to schedule a meeting with the person who gave it to them to discuss how insurance products can enhance retirement.



TAX-FREE RETIREMENT (Life Insurance Focused)

Find out how it truly is possible to accumulate money that can be accessed tax free…but only if it is done properly. This fun-to-read book reveals exactly how this concept works and should be required reading for every American.

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Cross-Selling Strategy

Execution Steps

- Review your client list and identify the three key client types:
  - Clients that don't own Life Insurance
  - Clients that don't own an FIA
  - Clients that own both FIA and Life Insurance (reserve list for the Referral Strategy)
- Initiate phone calls for positioning life insurance
- Initiate phone calls for positioning FIAs
- Mail letter and book the same day or next day of call/voicemail message
- Execute personal video message via BombBomb

Positioning Life Insurance: Client Doesn't Own Life Insurance

PHONE SCRIPT

Hi [Client Name]. I just wanted to check-in with you to see how you [and Partner's Name] are doing? I know that there is a lot going on in the world and just wanted to make sure that you are okay and to see if there is anything that I can do for you on the personal front, or if I can answer any questions you have pertaining to your financial [Accounts/Products] with us?

Also, I want you to know how much I appreciate you placing your trust in us and allowing us the opportunity to help you navigate your financial journey.

It's times like this, when uncertainty and extreme market volatility, that allow you to experience the true power of a Fixed Indexed Annuity and benefit from knowing that your principal is 100 percent protected. This is why I had recommended this [Date of Annuity Purchase for Your XYZ Account]. [Consider Reiterating Specific Features and Benefits of the Product the Client Owns]. This current economic scenario is why these products exist - to help you safeguard your financial future.

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To that end, I wanted to share with you an interesting read that I think you will find of value. One of my peers and long-time financial expert, Patrick Kelly, has written a short book called *Tax-Free Retirement*. The message in it is so timely and significant that I wanted to send you one as a gift. I believe you will find the message incredibly encouraging.

Once you receive the book, please take the time to read [Chapter X] and I will follow up with you next week to see what your thoughts are and answer any questions that you may have.

How does that sound? Great!

I will get that in the mail today and look forward to speaking with you. Is there a particular day next week that would work best for me to reach back out?

Again, thank you for your trust and being such a valued relationship for me and our firm. I hope you and your family stay safe and if there is anything that I can do to help, please don't hesitate to reach out and I look forward to speaking with you on [Confirm the Date and Time].

LETTER TEMPLATE

Dear [Client Name and/or Client Name]:

[Per our conversation/ Per my voicemail], I've enclosed a copy of *Tax-Free Retirement* by financial expert Patrick Kelly. As mentioned, I think you will find this a particularly interesting read as it paints a comprehensive picture on how life insurance can be used to help offset tax liabilities in retirement.

[Chapter X] has some excellent insight as it pertains to your current financial situation. You will find the book to be a really quick read. Take some notes and write down any questions that you may have so that we may address them on our [Day of Week, Date and Time] call.

Looking forward to speaking with you soon.

Kind regards,

[Signature]

[Advisor Name]
[Contact Information]

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VIDEO MESSAGE SCRIPT (BombBomb)

Hi [Client and Partner's Name]! I hope this video message finds you well. I wanted to check in with you to let you know that I dropped the *Tax-Free Retirement* book in the mail to you [Yesterday/Today], so you should receive it in the next few days. Be sure to read [Chapter X] as I think it's the most powerful message in the entire book – and one that will resonate with you. Looking forward to touching base with you next week. If you want to schedule a specific day and time, please select the [Schedule a Meeting Button in My E-Signature]. Talk with you soon!

Positioning FIAs: Client Doesn't Own a FIA

PHONE SCRIPT

Hi [Client's Name]. I just wanted to check-in with you to see how you [and Partner's Name] are doing? I know that there is a lot going on in the world and just wanted to make sure that you are okay and to see if there is anything that I can do for you on the personal front, or if I can answer any questions you have pertaining to your financial [Accounts/Products] with us?

Also, I want you to know how much I appreciate you placing your trust in us and allowing us the opportunity to help you navigate your financial journey.

To that end, I wanted to share with you an interesting read that I came across recently that I think you will find of value. One of my peers and long-time financial expert, Patrick Kelly, has written a short book titled, *Stress-Free Retirement*. What I thought you might find particularly interesting is the chapter dedicated to protecting your assets from market volatility and not compromising potential upside gains.

What I would like to do is send one of these books to you as a gift for you to read as I believe you will find the message incredibly encouraging.

Once you receive the book, please take the time to read [Chapter X] and I will follow up with you next week to see what your thoughts are and answer any questions that you may have.

How does that sound? Great!

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I will get that in the mail today and look forward to speaking with you. Is there a particular day next week that would work best for me to reach back out?

Again, thank you for your trust and being such a valued relationship for me and our firm. I hope you and your family stay safe and if there is anything that I can do to help, please don't hesitate to reach out and I look forward to speaking with you on [Confirm the Date and Time].

LETTER TEMPLATE

Dear [Client Name and/or Client Name]:

[Per our conversation/ Per my voicemail], I've enclosed a copy of *Stress-Free Retirement*. As mentioned, I think you will find this a particularly interesting read as it illustrates the power of how you can protect your money from market volatility, while not compromising the ability to potentially earn a competitive rate of return.

[Chapter X / Page XX] brings light to this topic and will take you less than 10 minutes to read.

As mentioned, I will follow up with you next week to get your thoughts on the book and to see if you have any questions.

Kind regards,

[Signature]

[Advisor Name]
[Contact Information]

VIDEO MESSAGE SCRIPT (BombBomb)

Hi [Client and Partner's Name]! I hope this video message finds you well. I wanted to check in with you to let you know that I dropped the *Stress-Free Retirement* book in the mail to you [Yesterday/Today], so you should receive it in the next few days. Be sure to read [Chapter X] as I think it's the most powerful message in the entire book – and one that will resonate with you. Looking forward to touching base with you next week. If you want to schedule a specific day and time, please select the [Schedule a Meeting Button in My E-Signature]. Talk with you soon!

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Referral Strategy

Execution Steps

- Collect referrals from clients who received the book
- Initiate call to prospect for positioning book offer
- Mail prospect letter and book the same day or next day of call/voicemail message
- Execute personal video message via BombBomb

Client

PHONE SCRIPT – Asking the Client for the Referral

Hi [Client]! How is your day going? How is [Client's Partner's Name] doing?

The reason for this call is that I wanted to touch base with you regarding the book that I mailed to you and [Client's Partners Name] several weeks ago. There's been significant demand from other clients for additional copies, so that they can hand them out to family and friends that they believe could benefit from reading this information.

As a result, I decided to circle back with all of my clients to let them know that I purchased additional copies for this reason and wanted to see if you would be interested in receiving additional copies that you can hand out as well? Great!

With everything going on with social distancing, I have been handling this a few different ways…clients have been providing me with the friend/family member's contact information so that I may mail the books directly, but I've been letting the recipient know that this gift is being directed by the client so they have some sense of where it is coming from. The second option is that I can mail them to you directly and you can distribute them accordingly. Either way is fine with me, so which way of getting them the books would you prefer?

Great! [Collect Prospect's Contact Information]

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Thank you for trusting me with this information and getting these books out to help educate those that are close to you. I will keep you posted if any of them respond requesting more information.

Again, [Clients Name & Partners Name] I appreciate your trust and please know that I never take it for granted. Also, if you need anything, please do not hesitate to reach out to me.

VIDEO MESSAGE SCRIPT (BombBomb) – Thanking the Client for the Referral

Hi [Client and Partner's Name]! I hope this video message finds you well. I wanted to personally thank you for the introduction to [Prospect's First and Last Name]. I had the opportunity to connect with [Prospect's First Name] and dropped a copy of the [*Stress-Free Retirement / Tax-Free Retirement*] book in the mail today. Thanks again for the introduction. Looking forward to speaking with you soon!

Prospect

PHONE SCRIPT

Hi, is this [Prospect's First and Last Name]? Hi [Prospect's First Name], my name is [Advisor's First and Last Name] with [Firm Name] and the reason I am calling is that your friend [Client's First and Last Name], who is also a client of mine, mentioned that you may be interested in a book that I had mailed to him a couple weeks ago. Do you have a few minutes to chat?

First, I know there is a lot going on in the world and I was wondering how you and your family are doing?

I am glad to hear that you are safe and doing well.

Again, the purpose of my call is that [Client's First Name] thought you might be interested in reading this book, [*Stress-Free Retirement / Tax-Free Retirement*]. It was written by one of my peers and long-time financial expert, Patrick Kelly. The message in it is so timely and significant that [Client's First Name] thought you would like to receive a copy. Since [Client's First Name] is a client of mine, I would like to send you a free copy of this book as a gift. I believe you will find the message incredibly encouraging and straightforward.

Once you receive the book, please take the time to read [Chapter 2] and I will follow up with you next week to see what your thoughts are and answer any questions that you may have.

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How does that sound? Great! May I have your mailing address? [Collect Prospect's Mailing Address]

Thank you. I will drop the book in the mail today and I will include my business card in the event any questions come up. And if it's okay with you, I will plan on reaching out to you in a week or so to confirm that you received the book and to see if you have any questions that I may be able to answer.

It was nice to speak with you today and I really appreciate you taking a few minutes out of your day to do so. I look forward to hearing your feedback on the book and I hope you and your family continue to stay safe.

LETTER TEMPLATE

Dear [Prospect's Name]:

Per our conversation, I've enclosed a copy of [*Stress-Free Retirement / Tax-Free Retirement*]. As mentioned, I think you will find this a particularly interesting read as it illustrates the power of how you can protect your money from market volatility, while not compromising the ability to potentially earn a competitive rate of return.

[Chapter X / Page XX] brings light to this topic and will take you less than 10 minutes to read.

As mentioned, I will follow up with you next week to get your thoughts on the book and to see if you have any questions.

Kind regards,

[Signature]

[Advisor Name]
[Contact Information]

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VIDEO MESSAGE SCRIPT (BombBomb)

Hi [Prospect's Name]! I hope this video message finds you well. I wanted to check in with you to let you know that I dropped the [*Stress-Free Retirement / Tax-Free Retirement*] book in the mail to you [Yesterday/Today], so you should receive it in the next few days. Be sure to read [Chapter X] as I think it's the most powerful message in the entire book – one that really speaks to our current economic environment. Looking forward to touching base with you next week. If you want to schedule a specific day and time, please select the [Schedule a Meeting Button in My E-Signature]. Talk with you soon!

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Direct Mail List Strategy

Execution Steps

- Review your direct mail list and identify the key prospect type:
    - Prospects who attended your workshop/seminar event and did not become clients
- Initiate phone call
- Mail letter and book the same day or next day of call/voicemail message
- Execute personal video message via BombBomb

Prospect Communications

PHONE SCRIPT

Hi, is this [Prospect's First Name and Last Name]? Hi [Prospect's First Name], my name is [Advisor First and Last Name] and I'm with [Firm Name].

The reason I am calling you is that you attended my workshop [Workshop Title] on [Date] and I am personally reaching out to each and every person to check-in to see if and how I can be a resource during this very uncertain time.

So how are you and your family doing with everything that is taking place in the world?

I am glad to hear that everyone is safe and doing well.

The other reason I am reaching out, is that I know a lot of us are spending more and more time at home these days and I found a book that may help you occupy some of that time. It's called, *Stress-Free Retirement,* and it was written by one of my peers and long-time financial expert, Patrick Kelly. The message in it is so timely and significant that I wanted to provide a free copy to those who have attended one of my workshops. What I would like to do is send you a free copy of this book as a gift. I believe you will find the message incredibly encouraging and straight forward.

How does that sound? Great! May I confirm your mailing address? [Confirm Prospect's Mailing Address]

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Thank you. I will drop the book in the mail today and I will include my business card in the event any questions come up. And if it's okay with you, I will plan on reaching out to you in a week or so to confirm that you received the book and to see if you have any questions that I may be able to answer.

It was nice to speak with you today and I really appreciate you taking a few minutes out of your day to do so. I look forward to hearing your feedback on the book and I hope you and your family continue to stay safe.

Well, [Prospect's Name], thank you for taking a few minutes out of your day to do so. I look forward to hearing your feedback on the book. I hope you and your family continue to stay safe.

LETTER TEMPLATE

Dear [Prospect Name]:

Per our conversation, I've enclosed a copy of *Stress-Free Retirement*. As mentioned, I think you will find this a particularly interesting read as it illustrates the power of how you can protect your money from market volatility, while not compromising the ability to potentially earn a competitive rate of return.

[Chapter X / Page XX] brings light to this topic and will take you less than 10 minutes to read.

As mentioned, I will follow up with you next week to get your thoughts on the book and to see if you have any questions.

Kind regards,

[Signature]

[Advisor Name]

[Contact Information]

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VIDEO MESSAGE SCRIPT (BombBomb)

Hi [Prospect's Name]! I hope this video message finds you well. I wanted to check in with you to let you know that I dropped the *Stress-Free Retirement* book in the mail to you [Yesterday/Today], so you should receive it in the next few days. Be sure to read [Chapter X] as I think it's the most powerful message in the entire book – one that really speaks to our current economic environment. Looking forward to touching base with you next week. If you want to schedule a specific day and time, please select the [Schedule a Meeting Button in My E-Signature]. Looking forward to speaking with you soon!

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