Tax Diversification and Retirement

What You Need to Know

Syndicated Webinar Featuring Patrick Kelly

Best Practices and Execution Guide

SIMPLICITY GROUP

Contents

High-Level Overview

Below is a high-level overview of the important steps participants of the *Tax-Diversification and Retirement* syndicated webinar must take to help generate the most success out of the program.

Step 1: Build your email list.

Step 2: Purchase copies of *Tax-Free Retirement*.

Step 3: Distribute the e-invitation.

Step 4: Attend the *Tax Diversification and Retirement* webinar with prospects.

Step 5: Review webinar activity report.

Step 6: Follow-up with attendees to schedule *Tax-Diversification Audits.*

For a detailed list of steps, please see the Activity Timeline.

Activity Timeline

The activity schedule presented below outlines the tasks Simplicity will carry out on your behalf, as well as the activities that should be handled by you, the Advisor/Agent, or a staff member **(represented in bolded text)**.

Pre-Webinar Activities	
20-21 Days	**Advisor/Agent to Build Email List**
20-21 Days	**Advisor/Agent to Purchase Copies of the book, *Tax-Free Retirement***
14-15 Days	Simplicity to Send Advisor/Agent the Webinar E-Invitation
14-15 Days	**Advisor/Agent to Distribute the E-Invitation to Targeted Email List and Social Media**
Ongoing	Simplicity to Distribute Registration Confirmation Emails
6-7 Days	Simplicity to Send Advisor/Agent the Reminder Webinar E-Invitation
6-7 Days	**Advisor/Agent to Distribute Reminder E-Invitation to Targeted Email List and Social Media**
3-5 Days	Simplicity to Send Advisor/Agent Lead Generation Activity Report
1-2 Days	**Advisor/Agent to Make Reminder Calls to Registrants**
1 Day	Simplicity to Distribute Webinar Reminder Emails to Registrants
1 Hour	Simplicity to Distribute Webinar Reminder Emails to Registrants
Webinar: Advisor/Agent to Attend *Tax-Diversification in Retirement* with Patrick Kelly Syndicated Webinar	
Post-Webinar Activities	
1 Day	Simplicity to Send Advisor/Agent the Final Lead Generation Activity Report
1-2 Days	**Advisor/Agent to Make 'Thank You for Attending' Calls and Email the *Tax-Diversification Worksheet* to Attendees**
1-2 Days	**Advisor/Agent to Distribute 'Thank You for Attending' Emails to Webinar Attendees and Email/Include/Attach the *Tax-Diversification Worksheet* to Attendees**
4-6 Days	**Advisor/Agent to Distribute 'We Missed You' Emails to Registrants Who Did Not Attend the Webinar and Invitees Who Did Not Register**
1-2 Days Ahead of First Appointment	**Advisor/Agent to Make *Tax-Diversification Audit* (First Appointment) Reminder Calls**

Marketing-Communication Assets

Below is a list of the marketing-communication assets that will help you optimize the results of your *Tax-Diversified Retirement Syndicated Webinar* results.

Targeted Email List

Create your targeted email list with the following parameters…

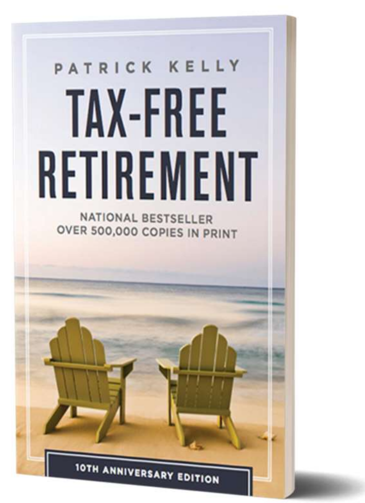
- Clients who do not own a Cash-Value Life Insurance Policy.
- Active prospects who do not own a Cash-Value Life Insurance Policy (add to list if unknown).
- Cold prospects who did not engage with your business.

Simplicity's Email Deployment Service

To qualify for Simplicity's email deployment, and have Simplicity will execute all email communications to your targeted email list, you must have a minimum of 1,000 email addresses and have your own MailChimp, Constant Contact, or similar email deployment account.

Access	Advisor/Agent to create list based on existing email database.
Utilization	This list will be used to distribute the webinar invitation, webinar reminders, and written follow-up communications.
Best Practices	After the webinar, be sure to remove the individuals who schedule a *Tax-Diversification Audit* with your business so that you do not burden them with redundant marketing communications.

Book: *Tax-Free Retirement*



Access	Book can be ordered at https://tfrsimplicity.com/. Use the discount code: 897 at checkout.
Utilization	Give copies of the book to prospects after the first appointment (referred to as the *Tax-Diversification Audit* discussion). You may also elect to leverage the free book offering to those individuals who were unable to attend the event.
Best Practices	Purchase books 20-21 days prior to the webinar. It is recommended that you purchase at least 10 books for every 1,000 invitees.

Webinar E-Invitation

Access	Simplicity will email your e-invitation copy and unique registration links 14-15 days prior to the first webinar date. The email will come from **taxfreeretirement@simplicitygroup.com** with the subject line: **Tax-Free Retirement Webinar E-Invitation**.
Utilization	Copy and paste the subject line and e-invitation copy and registration links into a new email and send to your targeted email list (those who have yet to register for the event).
Best Practices	It is recommended to distribute the invitation emails on Wednesdays or Thursdays at 9:15, 9:30 or 9:45 am. Be sure to use the subject line listed below.

[TEST SEND]: Tax-Free Webinar E-Invitation

Simplicity Group <simplicitymarketing@simplicityfm.com> Wed, Sep 13, 2023 at 1:45 PM
To: collin.pitstick@simplicitygroup.com

To view this email as a web page, go here

Tax Diversification and Retirement
What You Need to Know

Collin:

Please use the email template below to invite your targeted client and prospects list to the *Tax Diversification and Retirement* webinar on October 10, 2023 at 6:30 PM ET and October 11, 2023 at 8:30 PM ET.

It is recommended that you copy and paste the entire invitation into a new email. The two unique registration links (one for each webinar time slot) are unique to your business and should not be shared beyond your targeted email list.

You will receive a list of registrations and attendees in your *Lead Generation Activity Report* one week prior to the webinar and one business day following the webinar.

Also, be sure to have copies of *Tax-Free Retirement* books on hand, as Patrick will be encouraging attendees to schedule and attend a *Tax-Diversification Audit* with you to receive a complimentary copy. You can purchase copies at tfrsimplicity.com/ using the promo code: 897.

Please feel free to reply to this email with any questions.

Kind regards,

Simplicity Group

Client and Prospect E-Invitation

Subject Line: You're invited: Learn How to Unlock Tax Savings in Retirement

Email Copy:

[CLIENT/PROSPECT NAME]:

I am delighted to personally extend an invitation to you to attend a special educational webinar about the important **strategies that have helped my clients protect their income from unnecessary taxation in retirement**.

This event will feature a leading expert and author on creating tax-free retirement income streams, Patrick Kelly.

During this 45-minute virtual event, attendees will learn…

- The reasons why families may be exposed to greater tax risk in retirement.
- Potential tax liabilities for retirement income.
- Different strategies for mitigating tax risk in retirement.

Tax Diversification and Retirement: What You Need to Know
To register, please select one of the event links below.

October 10, 2023 at 6:30 PM ET

October 11, 2023 at 8:30 PM ET

I sincerely hope you can take advantage of this learning opportunity.

Kind regards,

The presentation and materials are not endorsed or approved by any other Government Agency. This is designed to provide general information on the subjects covered. Pursuant to IRS Circular 230, it is not intended to provide specific legal or tax advice and cannot be used to avoid penalties or to promote, market, or recommend any tax plan or arrangement.

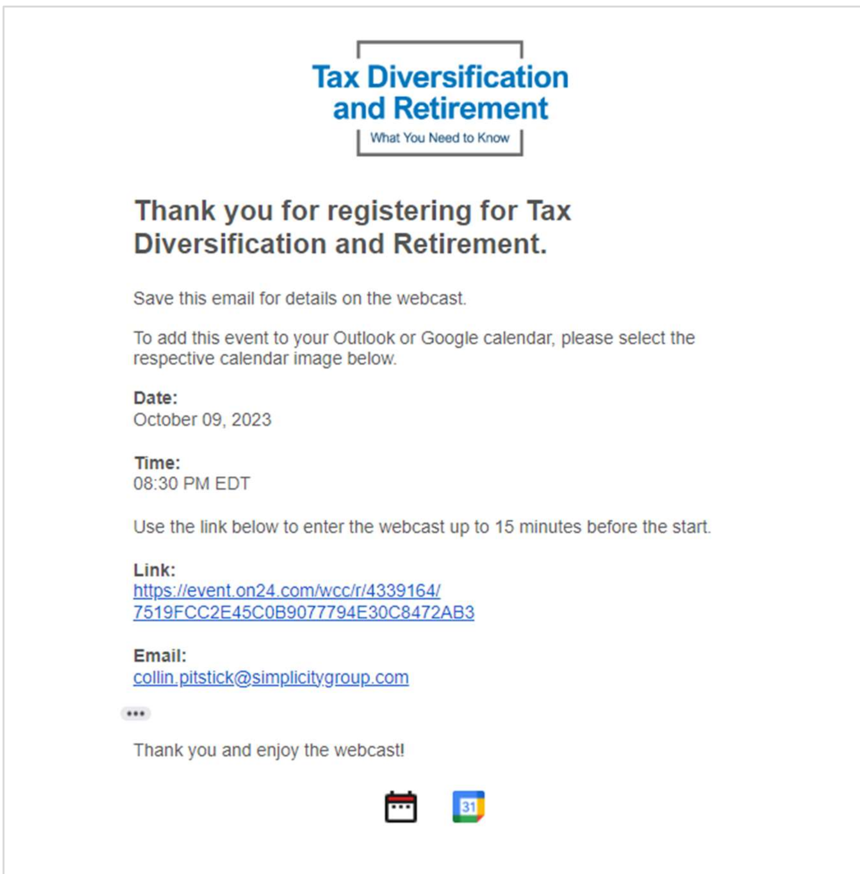
Social Media Post

Access	Social media posts are available for download in the TFR Insiders portal.
Utilization	Download and save the post to your computer. When posting the image be sure to add the dates and times of the webinar in your post copy and include your unique event link.
Best Practices	It is recommended to post to your social media accounts the same days and times as your e-invitations are distributed.

Suggested Post Copy: Please join us for an educational webinar about the important strategies that have helped many of my clients protect their income from unnecessary taxation in retirement. We will be hosting two events on [MONTH DATE and DATE, YEAR, at TIME] to register, please select the following link: [LINK]

Simplicity's Registration Confirmation Email

Access	Simplicity will email registrants a confirmation email within minutes of receiving the registration.
Utilization	Registrants will be instructed to add the event to their calendar.
Best Practices	Not applicable as this process is automated on the Advisor/Agent's behalf.



Tax Diversification and Retirement
What You Need to Know

Thank you for registering for Tax Diversification and Retirement.

Save this email for details on the webcast.

To add this event to your Outlook or Google calendar, please select the respective calendar image below.

Date:
October 09, 2023

Time:
08:30 PM EDT

Use the link below to enter the webcast up to 15 minutes before the start.

Link:
https://event.on24.com/wcc/r/4339164/7519FCC2E45C0B9077794E30C8472AB3

Email:
collin.pitstick@simplicitygroup.com

Thank you and enjoy the webcast!

Registration Reminder Webinar E-Invitation

Access	Simplicity will email your reminder e-invitation copy and unique registration links 6-7 days prior to the first webinar date. The email will come from **taxfreeretirement@simplicitygroup.com** with the subject line: **Tax-Free Retirement Registration Reminder Webinar E-Invitation**.
Utilization	Copy and paste the subject line and e-invitation copy and registration links into a new email and send to your targeted email list (those who have yet to register for the event).
Best Practices	It is recommended to distribute the invitation emails on Wednesdays or Thursdays at 9:15, 9:30 or 9:45 am

[TEST SEND]: Reminder: Tax-Free Webinar E-Invitation

Simplicity Group <simplicitymarketing@simplicityfm.com> Wed, Sep 13, 2023 at 1:43 PM
To: collin.pitstick@simplicitygroup.com

To view this email as a web page, go here

Tax Diversification and Retirement
What You Need to Know

Collin:

We are just one week away from your *Tax Diversification and Retirement* two-night webinar event. Please distribute the event reminder email content below to your targeted email list. Be sure to remove any individuals who have already registered for the event, this information can be found on your Lead Generation Activity Report.

You may reply to this email with any questions.

Sincerely,

Simplicity Group

Client and Prospect E-Invitation

Subject Line: **Important Reminder** - You're invited: Learn How to Unlock Tax Savings in Retirement

Email Copy:

[CLIENT NAME/ PROSPECT NAME]:

As a reminder, we are about one week away from the virtual event about the **important strategies that have helped my clients protect their income from unnecessary taxation in retirement**.

This event will feature a leading expert and author on creating tax-free retirement income streams, Patrick Kelly.

During this 60-minute virtual event, attendees will learn…

- The reasons why families may be exposed to greater tax risk in retirement.
- Potential tax liabilities for retirement income.
- Different strategies for mitigating tax risk in retirement.

Tax Diversification and Retirement: What You Need to Know
To register, please select one of the event links below.

October 10, 2023 at 6:30 PM ET

October 11, 2023 at 8:30 PM ET

I sincerely hope you can take advantage of this learning opportunity.

Kind regards,

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Simplicity's Lead Generation Activity Report

Access	Simplicity will send the Lead Generation Activity Report three to five days prior to the first webinar date and final report after the webinar concludes.
Utilization	Reference these reports when making webinar reminder calls and executing post-webinar activities.
Best Practices	When reviewing the lead generation activity report be sure to note the length of time the participant was on the call and any questions submitted so that you can tailor your follow-up calls to each attendee accordingly.

Example Lead Generation Activity Report

First Name	Last Name	Email	Reg Date	Attended	Minutes	Submitted Questions
David	Smith	john.smith@gmail.com	09/20/23	Y	59	When can I schedule a tax audit?
Jane	Doe	jane.doe@msn.com	09/20/23	Y	30	
Maria	Martinez	mariam123@gmail.com	09/20/23	N	--	
Elizabeth	Williams	ewilliams65@icloud.com	09/20/23	N	--	
Michael	Anderson	mmanderson@yahoo.com	09/23/23	Y	57	Should I factor in my wife's accounts on the worksheet?
Barbara	Lopez	barb.lopez@comcast.net	09/23/23	N	--	
Patricia	Johnson	pattyjohnson@icloud.com	09/29/23	N	--	
Robert	Miller	robertmiller@msn.com	10/04/23	Y	61	How do I schedule an appointment?
Samuel	Jones	sjones1958@gmail.com	10/04/23	Y	56	
Linda	Davis	linda.davis@yahoo.com	10/07/23	Y	60	Is there another event that my husband can attend?

Registrants	Page Hits	Conversion	Attendees	Attendance Rate
10	20	50%	6	60%

Simplicity's Webinar Reminder Emails to Registrants

Access	Simplicity will email registrants a webinar reminder email one day and one hour ahead of the webinar.
Utilization	Not applicable as this process is automated on the Advisor/Agent's behalf.
Best Practices	Not applicable as this process is automated on the Advisor/Agent's behalf.

Tax Diversification and Retirement
What You Need to Know

Tax Diversification and Retirement will begin tomorrow at 08:30 PM EDT.

Please use the webcast link below to enter the webcast:

Link:
https://event.on24.com/wcc/r/4339164/7519FCC2E45C0B9077794E30C8472AB3

Email:
collin.pitstick@simplicitygroup.com

Date:
October 09, 2023

Time:
08:30 PM EDT

System Test:
Test your computer to make sure you meet the minimum technical requirements.

Test Your System

To add this event to your Outlook or Google calendar, please select the respective calendar image below.

Thank you and enjoy the webcast!

Tax Diversification and Retirement
What You Need to Know

Tax Diversification and Retirement will begin today at 08:30 PM EDT.

Please use the webcast link below to enter the webcast:

Link:
https://event.on24.com/wcc/r/4339164/7519FCC2E45C0B9077794E30C8472AB3

Email:
collin.pitstick@simplicitygroup.com

Date:
October 09, 2023

Time:
08:30 PM EDT

System Test:
Test your computer to make sure you meet the minimum technical requirements.

Test Your System

To add this event to your Outlook or Google calendar, please select the respective calendar image below.

Thank you and enjoy the webcast!

Webinar Reminder Call Script

Script	Hi [CLIENT NAME]. This is [ADVISOR/AGENT'S /STAFF MEMBER'S NAME] from [BUSINESS NAME]. I want to personally thank you registering for our upcoming webinar on the importance of tax diversification in retirement with accomplished author, Patrick Kelly. I am excited for you to learn more about it. The strategies that Patrick will cover can help protect families from owing thousands of unnecessary tax dollars in retirement. As a reminder, the webinar is on [DAY OF WEEK, MONTH, DATE] at [TIME AND TIME ZONE]. I'll be sure to follow-up with you after the webinar to see if you have any questions. I look forward to seeing you on the webinar.
Utilization	Make this call to registrants 1-2 business days ahead of the webinar. Adjust the script based on speaking with the registrant versus leaving a voicemail.
Best Practices	Be sure to call the registrant at their preferred telephone number and time of day (if indicated in their registration). If this information is unknown, it is best practice to call their daytime number between Monday through Friday from 9:00 am to 5:00 pm.

Tax-Diversification Worksheet

Access	You should receive a PDF copy of the *Tax-Diversification Worksheet* with the Execution Guide in the "Welcome" email. You can download a copy of the worksheet from the webinar event page during the webinar or from the Marketing Materials section of the TFR Insider's portal.
Utilization	This worksheet is available to email to attendees as part of your post-event follow-up communications.
Best Practices	Ask the prospect to download and save the worksheet to their computer, fill it out and email the completed worksheet back to you ahead of your *Tax-Diversification Audit* (First Appointment). They can also elect to print a copy of the completed PDF form and bring it with them to the appointment. If the client/prospect forgets to bring a copy of this form, this could be a good first appointment exercise to accomplish together.

What Impact Could Taxes Have on Your Retirement?

Tax Diversification and Retirement
What You Need to Know

Effective retirement planning starts by understanding the potential impact of taxes on your future income.

Complete the table below to identify where the majority of your retirement assets are located.

Tax-Now Vehicles	
Savings Accounts	$
Checking Accounts	$
CDs	$
Stocks	$
Corporate Bonds	$
Mutual Funds	$
Total	**$**

Tax-Later Vehicles	
Traditional IRAs	$
Retirement Plans (i.e., 401ks and 403bs)	$
Pensions	$
Savings	$
Bonds	$
Qualified Annuities	$
Total	**$**

Tax-Free Vehicles	
Cash-Value Life Insurance	$
College Savings Accounts (i.e., 529 Plan)	$
Municipal Bonds	$
Roth IRA	$
Roth 401(k)	$
Other	$
Total	**$**

Total Retirement Assets $____________________

Tax-Now Vehicles	Tax-Later Vehicles	Tax-Free Vehicles
%	%	%

For help assessing the taxability of your assets in retirement, please schedule a **complimentary, no-obligation Tax-Diversification Audit** by contacting:

compass
RETIREMENT ALLIES

John Smith, Founder and President
P: 800-866-8666
E: john.smith@compassallies.com
Schedule an Appointment by Clicking Here

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'Thank You for Attending' Call Scripts

Conversation	Hello [CLIENT NAME]. This is [ADVISOR/AGENT'S NAME] from [BUSINESS NAME]. The reason for my call is to first and foremost, thank you for attending the *Tax-Diversification and Retirement* virtual event. Additionally, I am curious to learn what you learned, more specifically, what information proved to be of the greatest interest and/or value to you. If you're open to it, I'd like to run a few illustrations with you, to see if the tax-free retirement income strategies presented will help benefit your financial future. What does your calendar look like next week? To confirm, we have [DAY OF WEEK, MONTH, DATE] at [TIME AND TIME ZONE]. I look forward to seeing you then. One last thing, did you have the opportunity to complete the worksheet that was available for download? If not, I can email you a copy or we can complete it together when you are in the office. To confirm, your email is [RESTATE CLIENT/PROSPECT'S EMAIL]. In the meantime, if you have any questions, or if I may be of further assistance, please call me at [PHONE NUMBER]. We look forward to seeing you on [DAY OF WEEK, MONTH, DATE] at [TIME AND TIME ZONE].
Voicemail	Hello [CLIENT NAME]. This is [ADVISOR/AGENT'S NAME] from [BUSINESS NAME]. The reason for my call is to first and foremost, thank you for attending the *Tax Diversification and Retirement* virtual event. I am also interested in finding out what you learned, more specifically, what information proved to be of the greatest interest and/or value to you. Please give me a call at your convenience [ADVISOR/AGENT'S PHONE NUMBER], again that's [ADVISOR/AGENT'S PHONE NUMBER]. I look forward to connecting with you soon.
Utilization	Make this call to the client/prospect 1-2 business days ahead of the Tax Diversification Audit. Adjust the script based on speaking with the attendee versus leaving a voicemail. Also, if the attendee asked a question, be sure to acknowledge the question as part of the reason for your follow-up.
Best Practices	Be sure to call the registrant at their preferred telephone number and time of day. If this information is unknown, it is best practice to call their daytime number between 9:00 am and 5:00 pm.

'Thank You for Attending' Email Template

Email	**Subject Line:** Special Offer - Thank You for Attending the *Tax Diversification and Retirement* Webinar **Copy:** [CLIENT OR PROSPECT NAME]: Thank you for attending the *Tax Diversification and Retirement* webinar. I hope that it proved to be of value to you. In appreciation for your attendance, I would like to extend to you a complimentary, no-obligation, *Tax-Diversification Audit*, to help you identify and understand your potential income tax liabilities in retirement, as well as give you a complimentary copy of Patrick Kelly's best-seller, *Tax-Free Retirement.* To schedule a meeting, please [ADVISOR/AGENT'S CALL-TO-ACTION – CALL PHONE NUMBER – SELECT THE LINK TO MY CALENDAR]. Please be sure to download and complete the Tax Diversification Worksheet ahead of our meeting as this will help us detect a possible imbalance of your taxable retirement income. I look forward to meeting with you. Kind regards, [ADVISOR/AGENT'S SIGNATURE] Tax-Free Retirement is not endorsed or approved by any other Government Agency. The book and presentation are designed to provide general information on the subjects covered. Pursuant to IRS Circular 230, it is not intended to provide specific legal or tax advice and cannot be used to avoid penalties or to promote, market, or recommend any tax plan or arrangement.
Utilization	This email should be distributed 1-2 business days after the webinar to all individuals who attended the event.
Best Practices	It is recommended to distribute the invitation emails on Wednesdays or Thursdays at 9:15, 9:30 or 9:45 am. Be sure to attach the *Tax-Diversification Worksheet* to the email.

‘We Missed You’ Email Template

Email	**Subject Line:** Discover What You Missed at Our *Tax-Diversification and Retirement* Event **Copy:** [CLIENT OR PROSPECT NAME]: We are thrilled by the overwhelming response to our recent *Tax-Diversification and Retirement* virtual event. The invaluable strategies shared during the webinar have garnered exceptional feedback, underlining the significance of the retirement income planning knowledge presented. I’d like the opportunity to share with you the key takeaways and strategies that you missed. Moreover, as a token of my appreciation, **I would like to gift you a complimentary copy of the best-seller, *Tax-Free Retirement*, written by the authority on tax-free retirement income, Patrick Kelly.** To explore these insights and claim your free copy, please schedule a brief discussion with me at your convenience so that we can delve into if and how these strategies may be beneficial to your retirement. [ADVISOR/AGENT’S CALL-TO-ACTION – CALL PHONE NUMBER –SELECT THE LINK TO MY CALENDAR]. I look forward to connecting with you. Please feel free to reach out at your earliest convenience. Kind regards, [ADVISOR/AGENT’S SIGNATURE] Tax-Free Retirement is not endorsed or approved by any other Government Agency. The book and presentation are designed to provide general information on the subjects covered. Pursuant to IRS Circular 230, it is not intended to provide specific legal or tax advice and cannot be used to avoid penalties or to promote, market, or recommend any tax plan or arrangement.
Utilization	This email should be distributed 4-6 business days after the webinar to all individuals who did not attend and invitees who did not register for the webinar.
Best Practices	It is recommended to distribute the invitation emails on Wednesdays or Thursdays at 9:15, 9:30 or 9:45 am.

Tax-Diversification Audit (First Appointment) Reminder Call Script

Script	Hello [CLIENT NAME], This is [ADVISOR/AGENT’S /STAFF MEMBER’S NAME] from [BUSINESS NAME], and I am calling to remind you about your *Tax-Diversification Audit* on [DAY OF WEEK, MONTH, DATE] at [TIME AND TIME ZONE]. Also, if you will be bringing your significant other, please let us know so that we may prepare for the session accordingly. And please don’t forget to bring your completed *Tax-Diversification Worksheet* with you. If for some reason you’ve misplaced it, I’d be more than happy to email you a copy. If you have any questions, or if I may be of further assistance, please call me at [PHONE NUMBER]. We look forward to seeing you on [DAY OF WEEK, MONTH, DATE] at [TIME AND TIME ZONE].
Utilization	Make this call to the client/prospect 1-2 business days ahead of the *Tax Diversification Audit* meeting. Adjust the script based on speaking with the registrant versus leaving a voicemail.
Best Practices	Be sure to call the registrant at their preferred telephone number and time of day. If unknown, it is best practice to call their daytime number between 9:00 am and 5:00 pm.

Training and Marketing Support

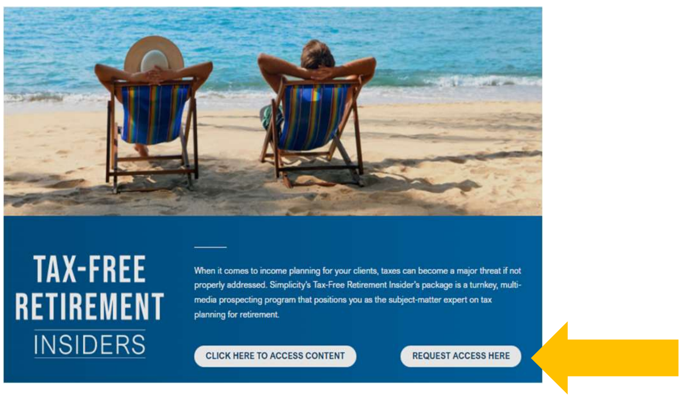
Advisors and Agents utilizing the syndicated *Tax Diversification and Retirement* lead generation program, have access to additional resources through the *Tax-Free Retirement Insiders'* portal.

TFR Insiders' Portal Resources

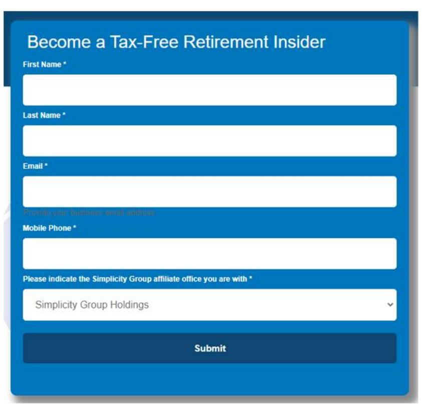
In addition to housing the resources for executing the *Tax Diversification and Retirement* syndicated webinar program, the portal also contains a library of training videos, marketing materials, and sales ideas, to use at no additional cost.

Request TFR Insider's Portal Access

- Visit www.tfrsimplicity.com
- Select 'Request Access Here'



- Complete the form (* indicates required fields)



- Within 24 hours you will receive an email from taxfreeretirement@simplicitygroup.com with your username and password.

For further assistance please email taxfreeretirement@simplicitygroup.com.

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