



The Savings Bond Educational Seminar – Success Guide

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A Proven Process To Motivate Prospects To Accept A Laddered Structure For Purchasing Annuities

The following are the various elements and steps that a successful team of 2 Financial Planners, aka Retirement Advisors, have developed over a period of approximately four (4) + years, to attract senior savings bond owners to attend an Educational Seminar and motivate these seniors to transfer most – if not all – of their assets into a laddered plan of Annuity investments.

They have demonstrated how this strategy has enabled them to process AVERAGE case sizes of \$250,000. They also boast of a single case involving more than \$600,000 in assets – all emanating from conducting Savings Bond Educational Seminars in libraries. Before reading this plan, you should have already reviewed the DVD containing a video of these 2 super-producers presenting their program. We are pleased to present their strategy to you, and hope that you will enjoy a similar level of success as they have by following their turn-key process.

1. Establishing a venue (where should you conduct a seminar)
 - a. Avoid hotels and restaurants – places that indicate an in-and-out process
 - b. Build a relationships with libraries – low or no cost, people associate libraries with education, a safe place, usually has abundant parking, is well lit, and most people know where it is
 - i. Approach a single library first, IN-PERSON, mention key words: a free EDUCATIONAL seminar, not a sales presentation, no products will be mentioned or attempted to be sold
 - ii. Get in contact with the DECISION MAKER. Don't talk with anyone but key person about the material. Ask for the person in charge. Do not deal with anyone but the key decision maker.
 - iii. Bring some of the materials; a sample Savings Bond Performance Report©, a sample presentation folder with the materials that you intend to pass out. Leave the materials with the decision maker.
 - iv. Offer to let them review the PowerPoint presentation you intend to deliver – and take the time to develop a relationship with this person who is in a position to help you become successful
2. Marketing
 - a. Radio (see sample radio script)
 - b. Newspaper inserts – use weekly or monthly publications, preferably those published especially for the senior market (see sample insert)

This is the end of our sample Success Guide – for more information please contact us at 800-717-2663 or <http://www.SBPlanner.com>