MARKETING GUIDE 2021

ADVISORS' ACADEMY
HOLDINGS

Table of Contents

Welcome to The Marketing Department

"Welcome to the Advisors' Academy, Sound Income Strategies and Retirement Income Store® family. We are delighted to have you join us!"

Erika Wilson
Director of Marketing & Events

Introduction

About The Guide

This Guide was created to accelerate the onboarding process and provide insight into the products and services available to your firm. From traditional to contemporary, we provide a broad range of marketing services to our Advisors that enables them to grow their practice. If you have any questions regarding any of the information found in this Guide, please feel free to contact us at 954-870-6712. Our Marketing Team is here to help you elevate your brand to the next level.

Your Business Partner for All Marketing Needs

We know how important it is to set clear objectives when planning a marketing campaign. With those in mind, the rest of your marketing activities can be planned accordingly. Objectives also help keep different marketing activities aligned.

In our competitive environment, you cannot afford to waste communication resources. Everyone else is making the most of their marketing budget, so failure to do the same will result in your practice falling behind. A strong strategy helps you maintain efficient communication with both customers and prospects.

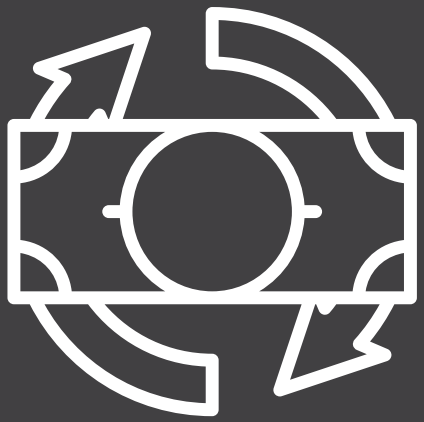
A clear brand voice translates to better, clearer communications. You will not have conflicting messages, different tones across multiple campaigns and inconsistent interaction with your audience. We understand this and are here to help you deliver the right message at the right time.

Milestones

Over 30 years of experience in the financial services industry

1990	Scranton Financial Group Founded
2006	Advisors' Academy Founded
2012	Advisors' Academy Grows Member Base 40% (December)
2014	Advisors' Academy Launches Practice Management Academy (July) Sound Income Strategies, LLC (SIS) Founded
2016	SIS Reaches $100M in AUM SIS Reaches $250M in AUM
2018	SIS Reaches $500M in AUM SIS Reaches $750M in AUM
2019	The Retirement Income Store founded SIS Reaches $1B in AUM SIS Reaches $1.25B in AUM
2021	SIS Launches Two Exchange Traded Funds

The Case for Fixed Income



After the Stock Market dropped by nearly 50% during the Dot-Com bubble in 2000-2003, and then again by nearly 60% during the Great Recession from 2007-2009, many investors realized they needed a new approach to saving and investing for retirement. More recently, the markets' volatility and decline of over 20% has forced many of us to rethink and reset our retirement strategies.

Unfortunately, despite these dramatic drops, many financial advisors and stockbrokers are still advocating old stock market-based investment strategies, or they take the easy way out and invest their clients' hard-earned money in bond funds.

Investing in individual fixed-income securities was merely an afterthought for most advisors because they lacked the specialized training required to effectively implement and manage individual fixed-income strategies.

With that in mind, we work with all clients to help make sure they have the best possible investment strategies that are tailored to meet their goals – placing a priority on financial self-defense and generating ongoing streams of income for retirement.

Advisors' Academy was founded in 2006 by David J. Scranton with a vision to recruit highly successful, motivated advisors and teach them how to achieve even higher levels of success – while always putting the interests of their clients first. Through ongoing personal coaching and training, hundreds of advisors across the country are now sharing Dave's vision. As the Academy continues to grow, we are continuously honing our existing systems and developing new cutting-edge tools and strategies. Our objective is not merely to keep pace with, but to anticipate the ever-changing landscape of our Advisors and their clients.

Founded in 2014, Sound Income Strategies, LLC is a Registered Investment Advisory (RIA) firm specializing in active management of individual fixed income securities. With a specialized management style and experience, the Firm focuses on maximizing the value of their clients' fixed income portfolios, then building retirement plans that deliver consistent income, growth potential, and most importantly, defense against damaging losses. As an RIA, Sound Income Strategies diligently honors their fiduciary responsibility as spelled out in the U.S. Investment Advisors Act of 1940. Their goal is to always act and serve in the best interests of their clients.

The Retirement Income Store, backed by Sound Income Strategies, is a virtual store where individuals can find a local Income Specialist who can help them reduce their exposure to stock market risk, while helping them generate ongoing streams of income for retirement. Launched in 2019, The Retirement Income Store is comprised of a national network of Income Specialists who proactively manage their clients' portfolios with the goal of maximizing income first and opportunities for growth second. To date, there are 30 Retirement Income Store franchises in 16 states throughout the country, with expansion planned over the next few years.

"Marketing's job is never done. It's about perpetual motion. We must continue to innovate every day."

— Beth Comstock, Former CMO & Vice Chair, GE

Your Marketing Team

ERIKA WILSON

Director of Marketing and Events

Since joining the Firm in December 2013, Erika has played an instrumental role in the Marketing Department's growth. She manages all aspects of marketing, encompassing online and print advertising, social media, communications, public relations, and promotional events. Erika also leads all market research and competitive analysis projects for the Firm. Erika oversees website development & maintenance, and the design of marketing collateral. Prior to joining the Firm, she was a Marketing Strategist at The Law Firm where she was responsible for managing a $1M advertising campaign, as well as their website redesign, SEO, and social media campaigns. Erika holds a B.A. in Communications from Florida Atlantic University and graduated Summa Cum Laude. In her spare time, Erika enjoys spending time outdoors, traveling, and the arts.

JOE COSTA

Segment Marketing Manager

Joe Costa joined Advisors' Academy in September 2019. His primary responsibilities include developing marketing strategies that encourage list growth through multi-channel execution, lead scoring, and list management that drives engagement and lifetime customer value. Before joining Advisors' Academy, Joe worked at Tenet Healthcare as a Marketing Automation Manager. During his time there, Joe became skilled at campaign development, testing, and engagement, as well as providing insight into marketing effectiveness, persona creation, database optimization, and customer retention. This has served him well in his role here. He holds a Bachelor of Business Administration from Pace University and a Master of Science from Steven's Institute of Technology. When he is not at work, Joe enjoys cooking, traveling, the gym, and spending time with his husband and their dog, Gus.

SARA FLORES

Project Management Coordinator

Sara Flores is our Project Management Coordinator and has been with Advisors' Academy since the beginning of 2021. Sara attended Mercer University and received a Bachelor's degree in Business Marketing. She quickly entered the workforce, beginning at Pentaho doing Marketing at their California office. Afterwards, she dipped her toes into the financial industry working for Voya in Florida. With Voya, she handled all of the marketing responsibilities for a team of 10, and she got to know the financial services industry. This is knowledge that she has brought with her to Advisors' Academy, where she coordinates all of the projects for our entire Marketing Department. When she's not at work, she loves to spend time with her husband and her dog or relax on the beach.

RICHARD HANNA

Social Media Specialist

Richard joined the Firm in November 2020. He attended Florida International University and has a Bachelor's in Liberal Studies. After graduating, Richard worked at Planet Air Sports, where he was the head of their social media department. He then went on to work for The Christmas Palace in the same role before working at Beauty Angels Academy as their Marketing Director. As the Social Media Specialist for AA, he handles all social media pages for our companies, tracks engagement, and develops copy for posts. Richard also helps our advisors create their social media pages and coaches them on best practices. He is also working closely with our Broadcast Department in helping improve our YouTube page for *The Income Generation* and is one of the main team members handling the development of our new Retirement Income Store channel.

ARMANDO MENDEZ

Editor and Videographer

In July of 2019, Armando joined our Marketing Team as a Videographer and Editor. Born and raised in Miami, he graduated from the Art Institute with a degree in digital video production and immediately went to work at Fusion Network in Doral as a Production Associate. In this role, he would shoot and edit various packages for all the different shows that the station aired. Following this, he would then begin work for Dynasty Apparel, where he did eCommerce photography. Armando is part of our Broadcast Team and he is involved in the production and post-production of each episode of *The Income Generation*. He also works on video projects for all our Advisors. In his free time, Armando loves to go to the gym, play video games, and watch movies.

BILL PACHECO

Lead Copywriter

Bill is our Lead Copywriter responsible for developing content for use in our various marketing efforts. Bill has been with us for three years now and has become a valuable member of the marketing team. Using his prior experience in the financial industry, Bill consistently delivers clear, concise, and compelling content for use in a wide range of marketing collateral. The types of projects that Bill works on include web copy, commercials, press releases, newsletters, scripts, blogs, the Published Author Program, and much more. He enjoys being part of an organization that helps individuals achieve their financial goals through education and risk management. When not at work, Bill enjoys spending time with friends and family, keeping up with the financial markets, spending time outdoors, and running ultramarathons.

JASON PERKINS

Web Developer

Jason joined us to apply his vast experience in coding to our process of fully optimizing all of our company and advisors' websites. Living in Miami, Jason enlisted in the US Navy and studied at the Naval Nuclear Power School as a machinist. After serving in the Navy, he headed to study computer science at Broward Community College, Florida Atlantic University, and University of Miami. Prior to Advisors' Academy, Jason worked at Nova Southeastern University for over 10 years as their primary web developer, helping to create and maintain nearly all of their websites. When he's not at work, Jason likes to spend time with his family, watching movies and shows on Netflix, and gaming on his custom-built PC.

SARAH SAMUELS

Broadcast Manager

Sarah is the Broadcast Manger and the contact for our in-house studio. She produces Dave's weekly television and radio show, *The Income Generation*. She also is instrumental in the production of both TV and radio commercials, as well as other advisor projects. Sarah graduated from the University of Florida with a B.S. in Telecommunications and has several years' experience working in television and news production. She actually started working with Dave and his show before she worked at Advisors' Academy! Her biggest project has been the build-out of our television studio, including making it capable of connecting to any professional television studio across the country. In her spare time, Sarah enjoys the beach and spending time with her family.

DEREK SCHWARTZ

SEO Specialist

Derek Schwartz is our resident SEO Specialist. A Navy Veteran, he attended Florida Atlantic University in Boca Raton Florida where he earned a double major in Multimedia Journalism and Sociology. After graduating, Derek entered the world of marketing, which he has been in for nearly six years. Before joining us he worked for an eCommerce company as their Marketing Coordinator and handled much of the marketing duties for them, helping boost their online sales and revenue. At Advisors' Academy, Derek is our Search Engine Optimization Specialist and is in charge of researching the best ways to maximize our reach and generate leads for our advisors via Search Engine Optimization and Paid Ad Management. When he isn't at work, Derek enjoys reading, working out, cooking, and spending time with his dog.

SPENCER SNITIL

Proofreader and Quality Assurance

Spencer is our resident Proofreader who handles Quality Assurance for the Firm. He has been with us for three years and oversees all content that we deliver to Advisors. Beyond simply proofreading all marketing projects and checking for accuracy, he has also become more involved with writing copy. He is responsible for putting together our weekly newsletter, The Income Insider, and has also been involved with The Retirement Income Store by becoming familiar with the Financial Disclosure Document, which describe the ins and outs of the Firm. He also helped develop our monthly Marketing Made Easy Newsletter, alongside Bill and Erika. When he isn't working, he enjoys working out, cooking, and spending time with his family, as well as his cat Piper and his golden retriever Lucy.

RICHARD STIEHM

Video Producer

Rich is our Video Producer and, at one point, was the only person in our entire broadcast team! Originally from Hampton Bays, New York, Rich got his start working on Nickelodeon on the staff of Blue's Clues as an Animator. After a few years, he left Nickelodeon to work at a boutique post-production company, doing "full service" work that included shooting, editing, and animating. After spending time at Visible World, him and his wife decided to escape the cold winters for the sunshine of Fort Lauderdale. He was originally hired as a web developer, but his knowledge and experience with animation and all aspects of pre- and post-production led to him to his current role, working on both Advisor projects and Dave's show *The Income Generation*. In his spare time, Rich loves spending time with his wife and dog, going to the beach, and playing music.

KEN STROEBEL

Copywriter

As one of our Copywriters, Ken is responsible for marketing and communications concepts and content across a broad range of formats, including e-blasts, video scripts, direct-marketing funnels, newsletters, magazine articles, blog posts, process manuals, brochures, social media, mailers, Web banners, and books. He is a graduate of Saginaw Valley State University, where he received his Bachelor's degree in English. Ken is our primary copywriter for our weekly show, *The Income Generation*.

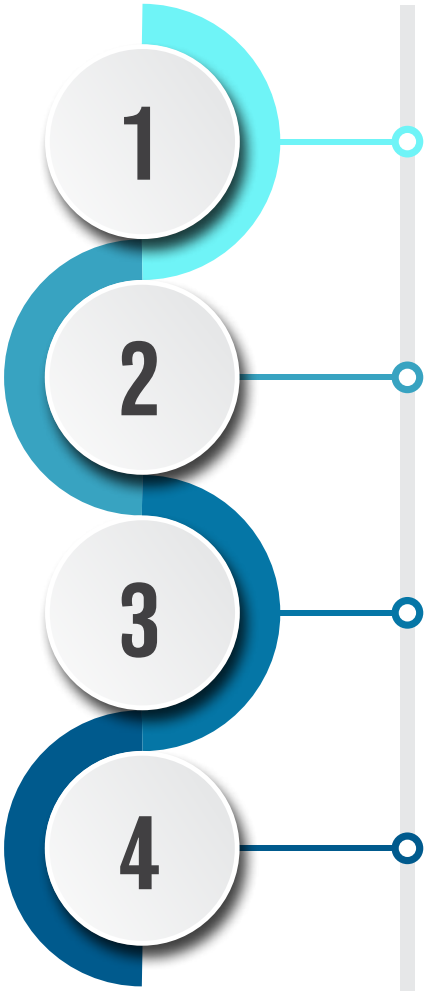
BART WILLIAMS

Graphic Designer

Bart has been involved with graphic design for over 12 years. He attended the University of Buffalo and graduated with a Bachelor's in International Business with a concentration in Marketing. After college, Bart spent time working for various businesses in retail, education, and medical fields. He honed his skills to help each employer increase his profile, image, and develop a brand identity to get to the next level. Since joining Advisors' Academy, he has become an integral part of our department. He says that his best attribute is that he brings experience from his previous jobs in both workflow and procedure and strives to do more than just "making something look nice". He likes to focus on "big picture" graphic design visuals that are marketing-driven.

Ordering Process

All requests for Marketing support start with the Marketing Order Form. This online tool enables colleagues to submit their marketing request right from their desktop and receive immediate confirmation upon submittal. The new form allows users to upload artwork and other documents at the time of submission. This improved method of requesting services has enhanced user experience, providing a simple and convenient way to request services.



Step One
Access the Online Marketing Order Form by visiting advisorsacademy.com/marketing-order-form

Step Two
Include all pertinent information needed for the project. Be sure to include project owner information (Name, Phone, Email), provide specifics about the project (the more detailed the better), desired completion date, and all documentation we would need to execute the project.

Step Three
Check all services required for the project (i.e. copywriting, design services, video services, etc.). Once you submit the request, a confirmation will be emailed to you. All submitters are responsible for final proofing and signoff. Projects must be submitted at least two weeks in advance.

Distribute
Utilitize the delivered asset and distribute as necessary.

2020 Accomplishments

Over the course of seven years, the Marketing Team has evolved into a group that is respected and relied upon by the advisors and their staff. We have vastly increased the amount of work we now create.

Recent Marketing Initiatives

- Online Webinars
- Digital Marketing Campaigns
- Virtual Informational and Recruiting Events
- Author Program with Forbes Books
- New PR Program
- Delivered hundreds of projects on time and error-free
- *The Income Generation* show celebrated five years on the air
- Advisors' Academy Advisors regularly appeared on national TV

Bull's-Eye Marketing

Bull's-Eye Marketing represents the most diverse and innovative array of lead generation tools in the financial services industry. Each system is strategically designed to maximize marketing ROI, and ultimately help advisors achieve sustained business growth. These innovative, market-proven strategies are organized in the form of prospecting targets, with the warmest approaches closest to the bull's-eye. As a stakeholder in each Advisors' success, the Marketing Team looks at each request holistically. Our skilled team works with Advisors to develop impactful content and design that informs, motivates, and even pre-sells. We have unparalleled success across all channels from print, web, email, and event management. We take ownership in each project and continually raise the bar with every deliverable.

Email Campaigns

All Advisors have accounts set up within iContact for email marketing projects. Each Advisor is given pre-built templates that may be used for local promotional activities. We work to ensure all campaigns are optimized and help troubleshoot problems when needed.

Branding & Identity

A strong brand name and logo/image helps keep your company in the mind of your existing and potential customers. A solid brand identity helps build customer loyalty. Brand identity includes logos, typography, colors, packaging, and messaging. It compliments and reinforces the existing reputation of your brand.

Advisor Newsletters

Delivered through The Income Insider, the Marketing Department produces a variety of newsletters for our Advisor colleagues. The newsletters offer insight into stock market happenings, tips on creating a world class practice, and customer-facing financial content to help take your firm to the next level.

Digital Advertising

Through Google Ad placement and search engine optimization, we can provide the foundation for improving the quality and quantity of customers searching for your services. Our team works with Advisors to target both unpaid and paid traffic to the Firm's website.

Social Media

Social media marketing enables our Advisors to connect with their audience to build brand awareness, client acquisition, and website traffic. This entails publishing great content on your social media profiles, listening to and engaging your followers, analyzing results, and running advertisements.

Web Dev. & Maintenance

Chartered with ongoing support for over 100 web sites, the Marketing Team takes pride in creating best-in-class digital assets for both internal and external customers. The group provides monthly statistics from our websites. Feel free to contact us with specific questions.

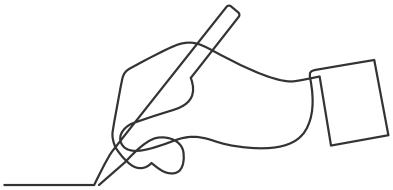
Premium Programs

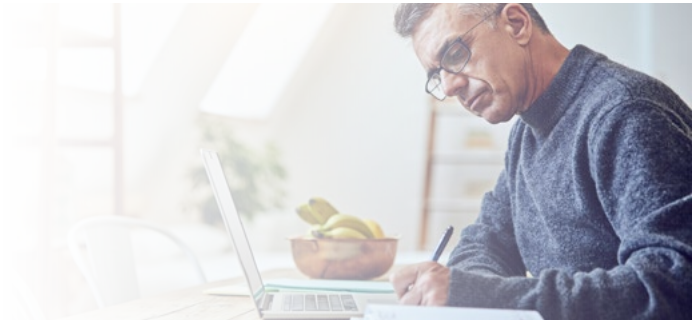
Once an Advisors' level of production exceeds $3 million, they become eligible for our Premium Programs that include National TV and Radio, Published Author, and Radio in Your Territory. Others may promise these programs, but we actually deliver.

National TV Program

Working hand-in-hand with the Marketing Team, we can immediately elevate an Advisors' name and brand in their area and beyond – with results usually within the first four weeks of the program. We can help fast track your progress through the process. Our top producers consistently give national TV and syndicated radio show interviews. Our Advisors have appeared on leading financial networks such as Fox Business, CNBC, and Bloomberg – on shows like *Opening Bell*, *Varney & Co.*, *Cavuto Live*, *Mornings with Maria*, and many, many more. In addition to being regularly sought out to appear on national TV and radio shows, our Founder, David J. Scranton, hosts a weekly TV show, *The Income Generation*, which airs every Sunday at 10AM EST on YouTube.

Over the past four years, leading financial celebrities like Steve Forbes, Peter Morici, Jim Rogers, Mohamed El-Erian, and others joined David to educate viewers on the financial topics that matter most to those who are retired, or close to retirement age. Each week, David also welcomes one or two of our top Advisors to appear on the show—providing an excellent branding opportunity for those Advisors selected. Additionally, the Marketing Team has recently helped one of our top Advisors launch his own TV show in his area, helping to further posture him as an Income Specialist.





Published Author Program

We offer our turnkey Published Author Program through a partnership with Advantage Forbes Books. A professionally-written book can help you build brand recognition to surpass the competition. Together, we develop strategies to help parlay your status as a Bestselling Author into new leads, higher net worth clients, improved closing ratios, and sustainable business growth.

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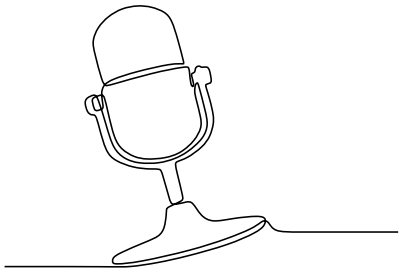

Radio In Your Territory Program

Advisors' Academy has exclusive partnerships with national radio vendors who work for independent advisors across the country. This relationship enables our Advisors to stand apart from the competition.

Our turnkey radio show format has already helped many of our advisors expand their reach and take their brand & practice to new levels. Currently, there are 18 Advisors participating in the program and many report significant uplifts in production from radio show leads. Instead of having to spend time chasing down new business, hosting your own radio show can help you attract it.

We're here for you.

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