

DECEMBER 18, 2020

MARKETING MADE

Advisor Success | Market Research | Monthly Updates



2020 In Review

We've Become Pretty Good at Making "Lemonade."

"When life gives you lemons, make lemonade." We are all familiar with this phrase that encourages a positive attitude in the face of adversity—and we have certainly faced our fair share of adversity this year.

Regardless of all the uncertainty and craziness that 2020 presented, we can say that we have all certainly become skilled at maintaining a positive outlook and making the most of our current situation. In other words, we've become pretty darn good at making "lemonade."

Here's a quick recap of how our plans for 2020 changed and how we were able to make the most of the changing business landscape.

Our First Ever Virtual SGOS

We had hoped to treat our top producers to desert luxury at its finest at The Four Seasons Resort in Scottsdale, Arizona this year—but instead we had to settle for our first ever virtual SGOS.

Instead of being able to meet in person, we got together digitally, through Zoom. Although a video conference cannot compare to the experience of gathering at the Four Seasons Resort, it did give us the opportunity to extend the invitation to all of you to join us virtually as an attendee. This way, you still benefit from the advanced leadership training and coaching from our fearless leader, David Scranton.

We also enjoyed our first-ever SGOS Virtual Happy Hour & Awards Ceremony, where many of you wore your craziest sunglasses and hats as we enjoyed some enjoy some camaraderie and crowned this year's Advisors' Academy Advisor of the Year, Wes Wood!

Virtual Sales Academy and Practice Management Academy

Many of you also joined us for our first-ever virtual Sales Academy and Practice Management Academy in June. Those in attendance enjoyed some one-on-one training with David and Andrew. Although we did not get the pleasure of enjoying your company in-person, these virtual events proved to be an effective way to learn about the adjustments we needed to make to our marketing, sales, and practice management to be able to thrive in the new corona-economy.



The Changing Business Landscape Has Helped Us Evolve our Skills

We are proud to say that many of you have taken the initiative to sharpen and expand your skillset to include things like virtual client meetings, live online webinars, and digital marketing.

As we once again face uncertainty about what kind of social distancing regulations that increasing COVID-19 cases could bring in the new year, it's important to realize that these digital skills we've developed in 2020 will most likely play an increasingly important role in the way we do business going forward.

As you get ready to wind down the year and enjoy some well-deserved relaxation with family and loved ones, please make sure to incorporate these skills and tools into your plans for next year, so you can be armed with the skills you'll need to achieve your goals in 2021.

Happy Holidays!

The Advisors' Academy Marketing Team



Digital Marketing Tools for Navigating the New Normal

Live Webinars

This year we learned that these online events can be successful—with certain topics like Social Security providing similar conversion ratios as some of our in-person workshops. We also learned that certain high-net worth prospects who would never consider attending an in-person workshop seemed more open to attending a virtual event. If you haven't hosted your first live webinar, we strongly suggest you do ASAP.

Google Ads Campaign

A well-thought-out Google Ads campaign can help your ad appear at the top of the Google Search results page, which can help to drive more traffic to your website, and drive in more leads. In today's increasingly competitive environment, an effective Google Ads campaign can help you stand out from your competition and make it easy for those who are searching the services you provide to find and get in contact with you.



Social Media

As you look for ways to expand your digital marketing presence in the new corona-economy, social media can be a cost-effective way to do so. If you are just getting started with your social media efforts, Facebook “Likes” campaigns can be a good way to establish a solid foundation for your social media presence.

Evaluation and Planning for 2021

As you get ready for the end of 2020, make sure you take the time to evaluate the programs you used this year and identify the ones that have been the most effective. Begin your plans for next year’s marketing campaigns with those that worked well this year, and most importantly, don’t hesitate to reach out to us with any questions or ideas on how we can help you make the most of your digital marketing efforts in 2021.

New Books by Advisors’ Academy Advisors in 2020

Congratulations to Scott McLean and Jim Lineweaver for the publication of their Amazon Bestselling Books in 2020!

[Three Blind Mice: How Today’s Financial Planning Process Leads Your Money to a Mousetrap](#)

by Scott McLean, CEO, Mclean Advisory Group, Waretown, New Jersey

Individuals receive investment advice from a financial advisor, have their taxes prepared by an accountant, and their estate plan written by an attorney. They’ve taken the right steps, yet the trap has been set. The problem is that these key consultants often don’t consult with each other. Scott McLean’s new book supplies the understanding readers need to keep their key advisors connected and operating off the same financial game plan.

[Your Retirement Playbook: Ohio’s Guide to a Successful Retirement](#)

by James S. Lineweaver, President & CEO, Lineweaver Financial Group, Valley View, Ohio

Jim Lineweaver wrote Your Retirement Playbook to help every Ohio public employee avoid leaving money on the table when it comes to the benefits they’ve earned and deserve. Although Jim’s book emphasizes public employees in Ohio, government employees across the country will discover solid financial advice about supplemental retirement benefits and options available through 403(b)s, 457(b)s, traditional IRAs, and Roth IRAs.

Give the gift of Financial Education to your clients, prospects, and staff, while supporting your fellow AA advisor. Both books are available for purchase on Amazon.com.





Advisor Megahit

Don Avgerinos

CBC, CEP, RICP, CFS, Founder and President, Spectrum Financial Group, Inc.

Each month, we like to feature an advisor that is doing great work out in the field. This month's featured advisor is Don Avgerinos, CBC, CEP, RICP, CFS, Founder and President of Spectrum Financial Group, Inc.

Don came aboard with Advisors' Academy in August of 2019, and set himself some very attainable goals for 2020. Of course, the pandemic through everyone's plans for a loop, but Don has stayed the course and is close to 90% of his goal, even after the pandemic. Despite Covid-19, he has managed to meet the marketing goals he set for himself while also continuing to write new business. Primary Coach Rick Bates had this to say:

"Don has worked hard on becoming a master of the Sales Process. He puts in the extra effort necessary and gets great results. He's a pleasure to work with."

Well done, Don! You're a great example of what you can achieve even when faced with adversity!



Marketing MVP: Jason Perkins

Jason began working with us a little over one month ago, and in that time he has helped us in our process of fully optimizing all of our 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. Jason has taken his experience and brought it to the Advisors' Academy Marketing Team with the goal of optimizing and developing our company websites, as well as working closely with our SEO Specialist Derek to ensure we're getting the best results from our campaigns.

Jason said his favorite project he's worked on is updating the SAFE website, because he was excited to fully promote Dave's message about Investing for Income. When he's not at work, Jason likes to spend time with his family, watching movies and show on Netflix, and gaming on his custom-built PC.

