

MARKETING MADE

Advisor Success | Market Research | Monthly Updates

EASY

SGOS 2022 RECAP

After three long years, we were all able to meet in person for SGOS 2022 in Key Largo, Florida. This year's theme – **Attract.Leverage.Elevate.** – focused on growing your brand through a variety of exciting new programs.

Filled with fun times and informative presentations, SGOS 2022 certainly did not disappoint. In addition to Anthony Saccaro being crowned Advisor of the Year, one of the highlights of this year's event was the presentation delivered by Erika Wilson, Director of Marketing and Events, and her team members. Erika was delighted to share the newly redesigned corporate websites and three new advisors' websites.

Several new initiatives have been implemented to help you maximize your marketing efforts and build your brand. Here's a quick wrap-up of some of the programs:

Video Marketing Program

It's not hard to see why video is so popular today. For one thing, it's an easy-to-digest format that gives our eyes a rest from the overabundance of textual information online. Your customers and prospects like it because it is engaging and insightful, and marketers like it because it can give a potentially high return on investment.

We will create a short branding reel showcasing you, your practice, and your clients. By highlighting what makes you unique as an advisor, you will be able to convert prospects faster. In fact, they will get to "know" you before ever speaking to you!

Online Lead Generation Program

Your website is the face of your brand, and the old adage "first impressions are the last impressions" is critical as far as websites are concerned. This new program focuses on site optimization, increasing traffic to your site, and site monitoring and reporting to ensure that your online presence is best-in-class. The goal is to do more with less and develop powerful marketing campaigns that are as impactful as they are cost-effective.

Social Media Management Program

Since introducing our Social Media Management program last year, we have grown from managing five accounts to 35! We have been able to transform your social media presence with high-quality, daily activity, and account monitoring. Our Facebook Ad Management program goal is to attract targeted prospects and convert them into loyal customers in a cost-effective way. The program optimizes your advertising budget with cost-per-lead and cost-per-appointment far below industry averages. Working together, our results-driven strategies are passionately executed by our social media team. That's why the results are even better than expected.



SGOS 2022 Advisor Awards

As you know, each year during SGOS we recognize advisors that have done exceptional work over the past year. These awards exemplify what being a member of the Advisors' Academy is all about. They take the time to learn the Sales Process, they practice their scripts, they host webinars and workshops, and they truly take their coaches to heart. Below are the award winners from this year's SGOS, and we couldn't be prouder of them!

Advisor of the Year

Anthony Saccaro

Rookie of the Year

Fred Atlas

Highest Year Over Year Production

Timothy Sparks

1st Place Highest Year Over Year Production Increase: 123%

David Stearns

2nd Place Highest Year Over Year Production Increase: 65%

Anthony Saccaro

3rd Place Highest Year Over Year Production Increase: 47%

David Wright

4th Place Highest Year Over Year Production Increase: 40%

Russell Stone

5th Place Highest Year Over Year Production Increase: 38%



Top Annuity Producers

Anthony Saccaro

1st Place

David McAdams

2nd Place

Russell Stone

3rd Place

Jeff Small

4th Place

Lindsey Cotter & Nathan Cox

5th Place

Top Assets Gathered Producers

Jeff Small

1st Place

Anthony Saccaro

2nd Place

David Stearns

3rd Place

Matthew Johnson

4th Place

Lindsey Cotter & Nathan Cox

5th Place



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MONTHLY MEGAHIT

Eric Lardner

Each month, we like to feature an advisor who is doing exceptional work out in the field. This month, we have chosen Eric Lardner. Eric has nearly 30 years of experience working in the financial markets, providing market analysis and financial planning.

Primary Coach Rick Bates had this to say:

Eric has been a student of the Scranton Sales Process and the marketing programs, and it is starting to pay off. In reviewing some of his prospect meetings during our last coaching session, each time I was about to ask him if he used a certain analogy to wedge or a track to disturb, he beat me to the punch before I could ask. I expect him to do quite well going forward. Thanks for the hard work, Eric. I am sure you will soon be rewarded! For that, Eric, you are our Monthly Megahit.

Well done, Eric, and congratulations on your continued success!

