



## A Message from Dave

12/7/2023



### Conditions are Prime for a Productive Client Review Season

As I noted in last week's message, with the year rapidly winding down, now is the time to make sure you're well-prepared to start the New Year strong. Many of us will be holding our last scheduled marketing event of the year either this week or next, which means it's important to get your marketing strategy in place now for January and beyond. You don't want a seminar or workshop invitation to hit mailboxes during Christmas week, but you do want it to hit sometime in the first week of January. But even then, it means you won't be doing the workshop until the week of January 15 at the earliest and won't be seeing any new prospects until about January 22 or later. The point is, if you drag your feet, you won't even have a chance to write any new business until February, and you'll have missed an entire month.

The other important point here is that even in a best-case scenario, if you do everything right and have a good marketing plan in place for January, most of you will still have a slow period to get through for about six weeks, as is typical at this time of year. As I also pointed out in last week's message, that means now is the ideal time to focus on doing Client Reviews. Your reviews have the potential to be especially productive this year, since interest rates and market conditions are still prime for helping certain clients with annuities improve their situation. So, take advantage of these conditions while they still exist and look for those opportunities, as well as potential opportunities on the AUM side with additional assets.

To hear more about this topic and several others, be sure to watch my December 7<sup>th</sup> Advisors' Academy video.

Have a great, productive week!

*Dave*

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