



## The Financial Organizer

Consider the lifetime value of a client and what it means to you and your business.

We believe that the gift of a Financial Organizer to your clients is an ideal way to show your clients that you value their confidence and trust in you.

**Your clients will use the Financial Organizer  
resulting in true value to your clients  
PLUS improve your bottom line.**

### FREQUENTLY ASKED QUESTIONS

#### What is The Financial Organizer?

It is a tool for you and your client:

- Keep your client's documents organized
- Uncover hidden planning opportunities
- Provide better advice
- More effective meetings
- Fosters loyalty



#### Will my clients use their Financial Organizer?

Some will and some won't, BUT everyone will appreciate receiving it.

The key is that every client who gets **The Financial Organizer** receives a value-added tool. You get paid by providing value to your clients and prospects.

#### Is it cost-effective?

YES. Consider the lifetime value of a client and then consider the \$20 cost of **The Financial Organizer**.

#### What type of binder should I use?

Follow these 4 easy steps:

- 3-inch binder with plastic 'framed view' cover which enables you to insert an 8.5" x 11" custom printed cover / spine.
- The cover of the binder AND the spine of the binder should include your client's name and your firm's name.
- Customized tabs should include: Financial Goals, Life Insurance,

continues on next page



### Michael Morrow, CFP

To learn why Mike is known as **The Leader in Marketing Strategies™**, contact us.

[Catch a sneak peak of Michael's presentation](#)

“Knowing what to say is as important as how you say it. Mike Morrow has compiled practical and implementable ideas and concepts for virtually any situation. Learn these and you can increase your effectiveness and sales efficiency.”

*Guy Baker  
MDRT Past President  
Top of the Table Member*

# The Financial Organizer continued

Investments, Mortgage, Wills, Estate Planning Statements, Employee Benefits, General Information. Ideas For Advisors Financial Concept pages would be ideal in this section, [Visit Our Store](#).

- Include a paper hole punch. One more thoughtful gesture to keep your clients organized. Be sure to attach your company label to the paper hole punch.

## Try This!

Turn your intangible client/advisor relationship into one that clients can pick up and hold and show to their friends.

Send your clients their Financial Organizer through the mail. The cost will be offset by the anticipation, surprise and appreciation that your gift will create.

**Your clients will say: "Thanks for getting us organized."**

We have included a LIVE audio of Mike explaining this strategy so that it becomes crystal clear for you.

Click Here



We have made it even easier! Here is a letter template to send to your clients with their Financial Organizer.



WORD DOC

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*George Sigurdson*  
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Every Financial Advisor needs proven, one-of-a-kind marketing ideas. Michael reveals marketing strategies that you can take home and implement immediately, that will get results.

Michael Morrow, CFP is a Financial Advisor and an International Speaker who has shared his Grand-Prize winning ideas all over North America, Asia, Australia and New Zealand and at Million Dollar Round Table events, including The 2012 MDRT Experience and The 2012 and 2009 MDRT Annual Meeting.

Find out why Michael Morrow, CFP is known as:

**The Leader in Marketing Strategies™**

Invite Mike to your next event!  
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All of Michael's presentations qualify for CE credits

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