IdeasForAdvisors.com

INNOVATIVE IDEAS TO GROW YOUR BUSINESS NOW

March 2013 Issue X

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

LIVE AUDIO

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

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