<u>What will the advisor learn from this presentation?</u>

In this presentation the advisor will learn about another effective financial planning option to market their services to their clients and prospects.

<u>Presentation Overview</u>

<u>White Glove will explain the following:</u>

- Exactly how they handle all the logistics, marketing, and up-front costs of educational seminars. Their webinar and in-person seminar programs allow advisors to keep their client pipeline growing and flowing without taking away their most valuable asset – their <u>time</u>.

- The biggest challenges advisors face when it comes to planning and hosting seminars – online or offline.

- How they eliminate those challenges, while shielding the advisor from the work and the financial risk.

- Their evolution to create a better “end-to-end” holistic approach to marketing by combining lead generation, social media, and email solutions to cover *all* bases from client acquisition to nurturing and brand development.

- Discuss real results that advisors in the trenches are seeing with their proven solutions!

PLUS Learn 7 Growth Hacks that a top financial advisor has implemented in his office and seen tremendous growth over the last 2-3 years, even through the pandemic!

1. Family Estate Organizer
2. Appointment Setter
3. Virtual Greeter
4. Red, Yellow, Green
5. Preview the Review
6. Client Appreciation Events
7. Any Marketing