



SAFE MONEY
MARKETING

VIDEO SALES LETTERS

Safe Money Marketing's Video Sales Letters leverage the power of video marketing to pitch a sales-focused offer to your prospective client, encouraging them to sign up for a complimentary appointment.



PRICING:
\$3,500 for the first month,
\$2,500 for each month
after. Requires a 90 day
initial commitment.
Guaranteed minimum of
10 leads per month!

HOW THEY WORK



Your VSL is placed on a Squeeze Page - a type of landing page - with one purpose: Convert traffic.



SME uses several different sources to generate traffic to your VSL.



The squeeze page encourages prospective clients to take the next step with a Call to Action (CTA). It is straightforward and outlines exactly what a prospect can expect when they take the next step.



The desired Call to Action with our VSLs is to sign up for a complimentary appointment.

Interested? Call 800.255.5055 or visit safemoneyevents.com for more information



ANNUITYRANK

Covers why and how clients and prospects should evaluate their current annuity and consider potentially better-performing alternative products, with an introduction to AnnuityRank software.

- How higher interest rates affect annuity performance
- Three ways to improve an annuity:
 1. Reduce fees
 2. Limit volatility
 3. Improve rates
- Impact of fees on annuity growth
- AnnuityRank: Objective analysis of an annuity product relative to what's currently available on the market
- Features:
 - Analysis of current annuity
 - Rank vs. current products on the market
 - Comprehensive benchmarking to determine if a change should be made



TAXES IN RETIREMENT

Discusses specific tax strategies clients and prospects can implement before they retire, and how smart tax strategies safeguard against penalties and excessive taxes on mandatory distributions.

- History of tax rates, including expiration of 2017 TCJA tax cuts
- Three pillars of tax fortification in retirement:
 1. Tax deferral
 2. Tax-free income
 3. Tax planning
- Tax status of Social Security benefits
- Tax-free income strategies: Roth conversion and HSA maximization
- Using municipal bonds, cash value life insurance, and guaranteed annuities to generate tax-free or partially taxable income



LEGACY MAXIMIZATION

Illustrates the differences between legacy planning and estate planning, common challenges faced by clients, and smart strategies to protect assets from market volatility, inflation and taxes.

- Common legacy planning mistakes:
 1. Too much estate planning
 2. Not funding trusts
 3. Assuming an estate plan starts when you pass away
 4. Accepting a cookie-cutter plan
 5. Not communicating your wishes with loved ones
- Developing a comprehensive legacy planning strategy
- Funding and optimizing trusts to reduce taxes and probate costs
- Considerations for special financial situations, care of loved ones, and business ownership