

## Unique Marketing Tools

Offered Exclusively by Rocco DeFrancesco  
Contact [blair@strategicmp.net](mailto:blair@strategicmp.net) for more information

### **What is your current IMO/FMO doing for you?**

If you are like most, you'll scratch your head and have to think hard to find something unique that your current IMO is doing for you. Most IMOs simply license insurance advisors and hope they place business with them so the IMO can make an override. Some provide decent service but most do not. IMOs have become a necessary evil in the insurance industry so advisors can obtain better payouts.

**Newsflash:** You can obtain as good or better contracts with **ANY decent IMO**. The question then becomes what "unique" value is your IMO bringing to the table that merits them getting your fixed life and annuity business?

We believe that we offer **several unique values** that are **not available elsewhere in the industry**. We understand how important it is to arm advisors with the "best" marketing tools so you can grow your business, provide the best advice to your clients and, of course, earn more money.

### **Obtain \$25,000+ worth of marketing tools for FREE!**

For an agent moving **ALL** of your fixed life and annuity business the IMO affiliated with Rocco as your go-to IMO, you will get access in one way or another to the following marketing tools. Or every time you place \$250,000 of fixed annuity premium or \$10,000 of target life insurance premium, you will receive a **\$500 credit** that can be used on the following tools.

It is our goal to arm you with the best marketing tools in the industry to make you unique in your local area so you can communicate the value of your services to your clients.

Some of the tools you will have access to as soon as you move all of your contracts and some you will have access to after you start placing business. The reason for the delay on giving you access to some of the marketing tools is because there are hard costs to them that need to be covered in order to give you access to them.

## The Tools

### 1) Nine New Educational DVDs

If you are interested in educating/motivating your clients on issues you'd like to help them with through third party verification, you might try using Rocco's new series of DVDs. The DVDs cover the following topics:

- FIAs with Guaranteed Income Riders
- Retirement Life™ vs. 401(k) Plans (LTC)
- The Home Equity Acceleration Plan (H.E.A.P.™)
- Bad Advisors: How to Identify Them: How to Avoid Them
- Medicaid Planning
- Retirement Life™ (EIUL)
- Single Premium Life Insurance
- Captive Insurance Companies
- Asset Protection

**To watch** the **Medicaid DVD**, click on the following link:  
<http://www.assetprotectionsociety.org/certified-medicaid-planner-intro/>

**To order** one or more of the DVDs, click on the following link:  
<http://thewpi.org/?a=CAT:42>

The above listed DVDs can also be used as **streaming videos** on an advisor's ghost site (see #4) below.

2) **Exclusive doctor marketing platform** (<http://www.strategicmp.net/page/life/doctormcme>)

Why work with doctors? Because they make good money regardless of how the economy is performing. With this exclusive marketing platform, advisors will be able to give doctors **21+ hours of Category I CME credits** just for meeting with you. Advisors will also be able to become a speaker for medical societies, medical practices, and Independent Physician Associations (IPAs).

3) **Give away my books for free marketing platform**—our newest and one of the most powerful marketing tools in the industry today is the ability to give away the following educational/motivational books in an electronic format (iPad, Kindle, etc.):



To view a **tutorial video** showing you how the free-book website system will work, click on the following link: [http://thewpi.org/camtasia/free.book.site/free.book.site\\_controller.swf](http://thewpi.org/camtasia/free.book.site/free.book.site_controller.swf)

To view/review what your custom website would look like, go to [www.educationforretirement.com](http://www.educationforretirement.com).

If you want the **order form** so you can sign up to use my download for the free-book website, please click on the following link: [http://www.thewpi.org/pdf\\_files/order.form.free.book.site.pdf](http://www.thewpi.org/pdf_files/order.form.free.book.site.pdf)

4) **Ghost web-site** (Normally \$950 annually). This is an item that you can start using for free when you meet production requirements). To learn more about ghost web-sites, click on the following link: <http://www.strategicmp.net/page/life/website>.

Most advisors do not have a web-site that they like or that they think will help motivate clients to contact the business for more information (which in turn will increase sales). Rocco has an absolutely unique ghost web-site advisors can use as their own. If you want to have a web-site you can be proud of and one that will both **educate** and **motivate** your clients, then you need to start using the website offered exclusively by the IMO affiliated with Rocco.

To view the basic ghost web-site, go to the following link:  
<http://www.wealthpreservationinstitute.com/>

Those who choose to utilize this powerful marketing tool can customize the site with their own picture and contact info. If you want to change the look and feel, that can be done as well. You'll also notice that the site comes with several **streaming videos** to help educate and motivate your clients.

5) **H.E.A.P. software** (<http://www.heaplan.com>) (normally \$500 or \$750 if you get your own web-site).

As soon as you transfer your contracts to the IMO affiliated with Rocco DeFrancesco, you will get access to the **Home Equity Acceleration Plan** (HEAP) calculator and can start running illustrations. When you start placing production you will then be setup with your own HEAP web-site that you can send clients to where they can learn more and sign up for more information. This is the "best" new client generation concept in the industry today.

The power of the following chart (taken from an example output of the illustration system) says it all. The red bars show how long it takes to pay down a 30-year mortgage and the green bars show how quickly this example client could pay his/her mortgage debt using HEAP.



<http://www.thewpi.org/camtasia/heap.new.software.basic/>

The following is a voiced-over presentation you can e-mail to clients or post on your web-site for clients to learn the power of H.E.A.P. and to motivate them to contact you.

[http://www.thewpi.org/Flash.presentations/HEAP.Client/Presentation\\_Files/](http://www.thewpi.org/Flash.presentations/HEAP.Client/Presentation_Files/)

Click on the following link ([http://www.thewpi.org/pdf\\_files/HEAPBrochure.pdf](http://www.thewpi.org/pdf_files/HEAPBrochure.pdf)) and view the H.E.A.P. brochure you can use and insert your own name, address (on the front page) and e-mail address (on the last page). It functions as a tri-fold and is again a great way to motivate current and potential clients to contact you for more information.

6) **The 4orce CRM system** (Normally \$500 for two users and \$500 for each additional five users). Isn't it time to **grow your business** (generate new sales) and **provide better service** to your current clients? **The 4orce** is the first CRM program specifically designed for professional users at a price point you can't say no! **Stop using Outlook or Act**. If you are not using a CRM program, you need to let **"The 4orce be with you"** and get into the 21st Century when it comes to **growing** and **protecting** your business.

The 4orce has the most powerful e-newsletter system in the industry with newsletter provided to users that can be sent out twice per month.

The 4orce also is the **ONLY** system in the industry to couple a double opt in e-mail/landing pages system with a CRM program.

There is nothing in the market like **The 4orce** and you can have this very powerful program for **FREE by working with the IMO affiliated with Rocco DeFrancesco**. To learn more, go to <http://www.the4orce.net>.

7) **Life illustration software** (it prints out a unique 8-page sales presentation) (Normally \$700 a year (\$350 for Part I and \$350 for part II)). (**For more information** on this unique illustration system, please [click here](#)).

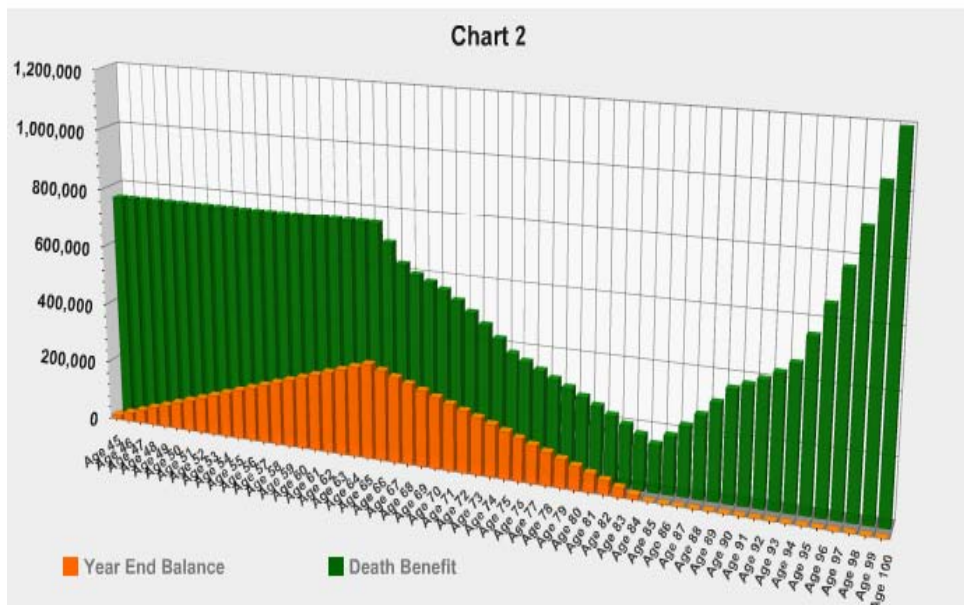
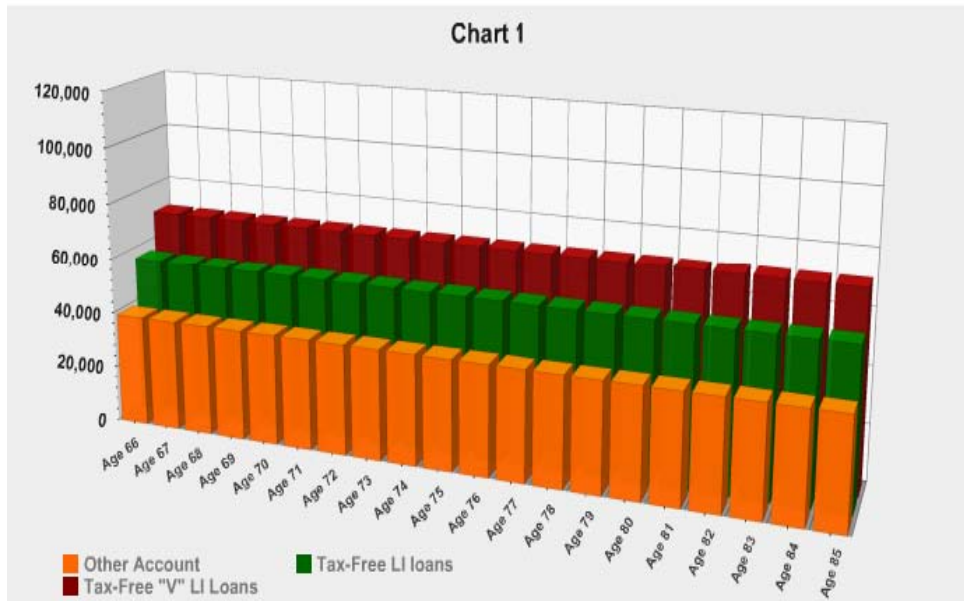
As soon as you move your contracts, you will get access to this very powerful illustration system. There is no better illustration system in the market today you can use to help show your clients the value of growing wealth with cash value life insurance.

**Part I** of the software allows you to show clients the difference between growing wealth in the stock market and compares that to growing wealth with EIUL insurance. See the following training video showing you how simple it is to use the software and the one-of-a-kind sales presentation that is created.

<http://www.thewpi.org/camtasia/8.page.life.software.level/>

**Part II** of the software allows you to compare growing wealth in a traditional tax-deferred retirement plan (IRA/401(k)/profit sharing plan), a Roth IRA or 401(k) Plan to growing wealth in a cash value life insurance policy. This is the most realistic illustration software of its kind and is a must-have tool if you are trying to communicate the unique value of building wealth with cash value life insurance. A video illustrating how it works will be posted shortly.

See the following very powerful charts that are part of the sales output (orange is how much can be removed from a brokerage account, green is from a CLV policy using wash loans, and maroon is how much could be removed using variable loans).



8) **Guaranteed Income Benefit (GIB) Calculator** (Normally \$500 a year). [Click here to learn more](#). One of the most powerful wealth building/retirement tools advisors have to offer clients is a fixed indexed annuity with a GIB rider. The problem with selling this product to clients is making sure they understand it. The best way to drive home the benefit of a GIB rider is through an illustration. The insurance companies have their own software but it is not very good and does not show the actual account balances with and without the rider fee. Additionally, the insurance company software uses static returns. We are proud to bring you a proprietary GIB rider calculator that can calculate the needed numbers on virtually every product and do so in a dynamic manner (meaning you can actually put in hypothetical returns to drive a more real world

output). In addition to showing the guaranteed income, the calculator also shows the actual account balances with and without fees.

Also, the calculator is the only one in the industry that allows advisors to illustrate the very powerful **increasing income** GIB Rider. Look at the following chart from the calculator output that illustrates what an increasing income rider can provide to an example client.



If you are selling FIAs with GIB riders, this software is a must. To watch an overview video on this calculator, please use the following link:

<http://www.thewpi.org/camtasia/FIA.GIB.Intro.Video/FIA.GIB.Intro.Video.html>

9) **Roth IRA Conversion Calculator** (normally \$500 a year). It seems to be all the rage to tell clients to convert their traditional IRAs to Roth IRA (especially in 2010 when there is an unlimited ability to do so). The fact of the matter is that Roth IRA conversion **DO NOT** work for most people who are converting so they can receive more after tax income in retirement. If you are giving advice on this important issue, you better make sure it's correct (or the lawsuits that will follow can be significant). In order to run a "real world" comparison to determine if converting makes financial sense, you need not the 2-4 inputs most free online calculators allow for but instead, you need in excess of 10 inputs. To view how our proprietary Roth IRA conversion calculator works to determine if it's a tool you need to use, please click on the following link:

<http://www.thewpi.org/Flash.presentations/Roth.IRA.Calc/Roth.IRA.Calc.html>

10) **Ability to give 30+ hours of CPE credit to CPAs** (normally \$2,500 a year)

As soon as you move your contracts, you will have the ability to give in excess of 30-hours of CE credit seminars to CPAs, EAs and accountants. Many advisors have made millions of dollars network marketing with CPAs. When working with the IMO affiliated with Rocco DeFrancesco, you will be absolutely unique in your local area by being able to give CE credits to CPAs on a whole variety of important topics, many of which will be income producing due to the fact that they use life insurance and annuities. There is no better way to lift your credibility with CPAs than to be the "expert" giving them CPE seminars.

11) **E-newsletters and the e-newsletter system** (Normally \$650 annually. This is an item that you can start using for free when you meet production requirements)

If you are not sending educational e-newsletters to your clients and potential referral sources at least two times a month you are making the biggest mistake today when it comes to marketing and growing your business.

Roccy has a turnkey e-newsletter system where we provide for agents two unique educational/motivational e-newsletters you can send to your clients and referral sources. These e-newsletters are created by Roccy DeFrancesco. Additionally, Roccy has an e-mail system that allows you to send as many newsletters as you want AND tracks who receives your newsletters and how many times they open them. If you want to take your marketing to the next level, you need to be using this drip-marketing system.

Click on the following to see how the system works:

<http://www.thewpi.org/camtasia/e.mail.blasting/>

12) **Name on the front cover of books** (Cost is \$1700 per 100 books. This is an item that you can start using for free when you meet production requirements).

You can write the foreword for each of the following books. This is one of the most powerful marketing tools you will ever get your hands on. It is much more impressive to hand an interesting/motivational book to a client with your name on the cover than it is to hand out a business card.

Books:

-**Retiring Without Risk**. <http://www.retiringwithoutrisk.com/> . The number one sales book in the industry today for those who want to sell EIUL or FIAs (and ones with the GIB rider).

-**The Home Equity Management Guidebook: How to Achieve Maximum Wealth with Maximum Security**. Click on the following link to learn more about this book <http://www.thewpi.org/?a=PG:1011>.

-**The Home Equity Acceleration Plan (H.E.A.P.<sup>TM</sup>)**. Click on the following link to learn more about this book: <http://www.thewpi.org/?a=PG:1001>

13) **Flash voiced-over PowerPoint presentations** (normally \$25 a month per 3 presentations)

If you want to communicate the value of several topics to your clients, using these flash PowerPoints is a great way to do so. As soon as you move your contacts over to the IMO, you will be able to use these presentations. You can e-mail them to clients and/or post them on your web-site for viewing. Many advisors have already made significant product sales by motivating their clients using one or more of these presentations.

Click on the name of each one to bring up the actual flash presentation you can review.

[Single Premium Life Insurance Policies](#)

[The Super 401\(k\) Plan](#)

[FIA's with a 7% guaranteed rate of return \(accumulation value\) and guaranteed income for life](#)

[Fixed Indexed Annuities \(general\)](#)

[Equity indexed life insurance \(how to build wealth with cash value life\)](#)

[Equity Harvesting \(removing money from a home to fund life insurance\)](#)

[Asset Protection \(basic\)](#)

[The Maximizer \(how to nearly double the return of the S&P 500 using FIA's\)](#)

[Basic Estate Planning](#)

[Captive Insurance Companies \(CICs\)](#)

[Charitable Planning](#)

14) **The Certified Wealth Preservation Planner (CWPP™) course** (\$1,300 which will be paid out of production credits)

We believe that in order to provide the best comprehensive and compliant advice to high income/net worth clients you have to attend the “best” educational courses. The best and the only “advanced” education course in the industry the CWPP™ course.

We at our IMO believe taking the CWPP™ is a must in today’s ever increasingly difficult and compliant crazy environment. As such, we will reimburse agents who have not yet obtained the CWPP™ designation for taking the program.

### **Summary of unique marketing tools offer through the IMO affiliated with Rocco DeFrancesco**

Let’s start out with the same question that we started with: what is your current IMO/FMO doing for you? What unique benefits are the IMOs you are working with providing? If you are like the vast majority of advisors in the insurance field, the answer is **NONE** or very little.