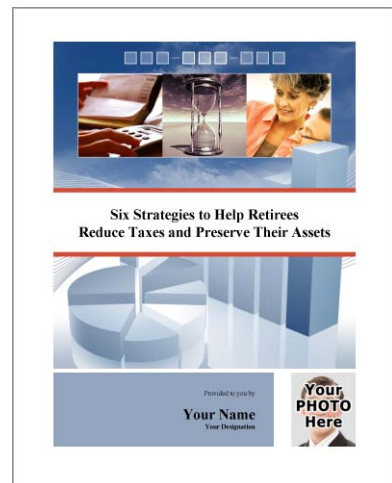
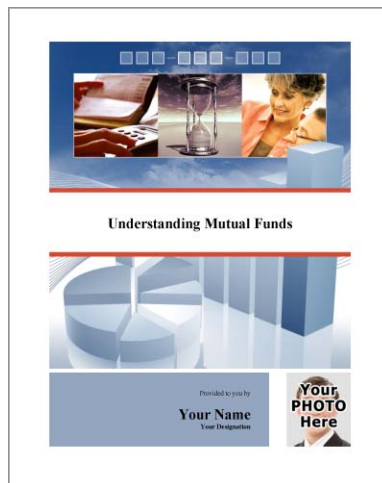
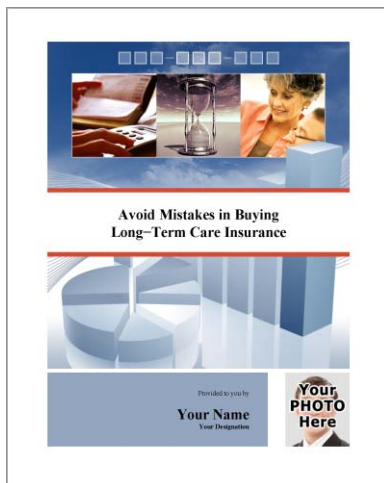
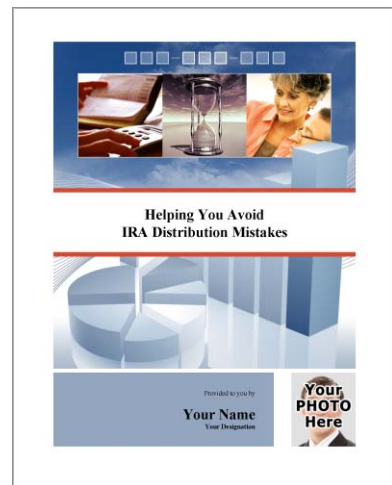
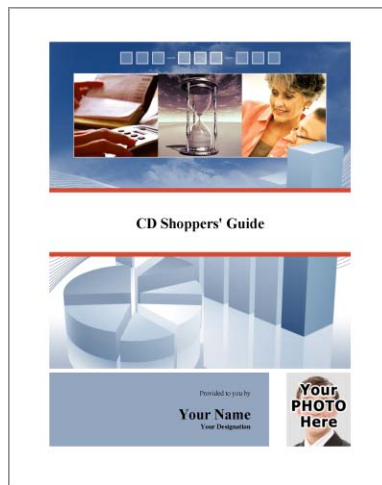
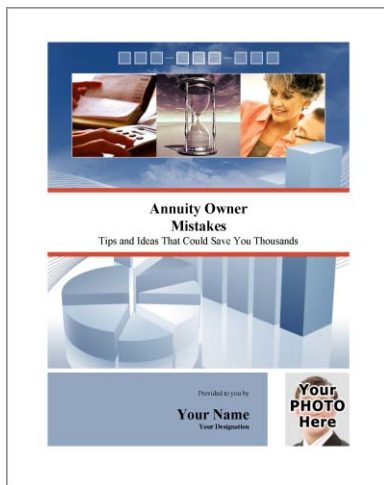


# Sixteen Ways to Use Your Booklets to Generate More Business



## - Have Prospects Call for Your Booklets -

### Here are 16 Profitable Ideas

#### 1. Send Them to the Bigwigs in Town

You may not be able to get through on the phone to the important and rich executives in town. But send your booklet with Exhibit A and you'll get some attention.

#### 2. Give Them Out at Seminars

If you're not doing seminars, you should. It is still the easiest way to open accounts. I do one seminar a month and get 40 to 60 people in attendance, and then have appointments with half of them.

A great way to solidify your position as an expert and not just another broker is by using your booklets at seminars. Just writing on your invitation, "Your presenter is John Doe, author of *Avoid Mistakes in Buying Long-Term Care Insurance* and *Helping You Avoid IRA Distribution Mistakes*" will increase your attendance. People love to hear authors speak.

Give the copies out at the beginning of the seminar as people come in. Before you even start talking, they will be impressed and more open and accepting of your entire presentation (and more likely to make an appointment). Although half of the people will make appointments with you, you'll get even more appointments when you follow up with the other attendees and use this script:

*"Mrs. Jones? This is Joseph Advisor. You attended my seminar this last month at Beehop restaurant. Thanks for coming. I was curious if you read either of the booklets we passed out on..."*

#### 3. Use Them Every Time You Have a Prospect in Your Office

Give a booklet to every face-to-face prospect *before* you start your meeting. Nothing will build your credibility and make your presentation as effective as positioning yourself as the expert author before you start talking about investments.

#### 4. Send Them to Clients

Send the booklet to clients. Call them in 10 days—ask them if they got it. Regardless of the response, tell them you have a few extra copies and ask them to whom they would like you to send a copy. I recommend you do this with only the top 20% or 30% of your customers so that you get referrals from the rich people:

*"Hi, Bob? This is Joseph. Did you get the copy of my booklet I sent you? Listen, you are a very good client and we've done business together for years. I have a few copies of booklets left over from the recent printing. I thought I'd offer to send them out as a gift to you or to any friends or associates you think might value some good financial information. Who would you like to get a copy?"*

Every quarter, send one of the other booklets (there are currently six available, and we have other topics in the pipeline) to your clients using the same approach above. This is the kind of value-added, unexpected service that clients desire and that most advisors don't supply.

## **5. Use Them to Get Speaking Engagements**

Want to teach a class at the local university? Want to speak before a group? They'll invite you if you're an author. Send a copy of your booklets with your cover letter. It gives you the instant credibility needed to open the door.

## **6. Send Them to Corporations**

Would you like to give retirement seminars in corporations? They don't hire just any advisor in town. They would like to hire an author. Use your booklets to set yourself apart. Try the letter in Exhibit B after you've contacted the correct Human Resources person.

Your ultimate goal, of course, is the company's juicy 401(k) business in addition to those individual rollovers.

## **7. Send Them to Referrals**

I get referrals all the time. When I do, I send a packet that includes my booklets. When I follow up, I get a welcoming reception and treatment like a professional, rather than the response, "*I already have a broker.*"

## **8. Use Them to Get Interviewed in the Newspaper**

Want to write an article in the local newspaper or get interviewed? Send the business editor of your local newspapers a copy of your booklet with a copy of the press release in Exhibit C. Let them know you're an author and the press will want to speak to you.

## **9. Use Them to Get a Radio or TV Show**

Contact the program director at the local cable TV station or local radio stations. Send them a letter regarding your availability and enclose a copy of your booklet. Many cable TV stations are hungry for programming, so you should hit pay dirt easily. Then, when you do seminars or any other publicity, you can add, "as seen on (name of show)."

## **10. Post a Flyer**

Use a flyer to advertise your booklet to a targeted audience (see flyer in Exhibit D). It costs nothing to post flyers where qualified seniors might see them:

- Post flyers on bulletin boards in the supermarket or drug store or senior center.
- Put a stack of flyers or booklets in your doctor's waiting room.
- Leave a stack of flyers or booklets in the bank or anywhere that has significant senior traffic.

## **11. Place the Booklets in Strategic Places**

Leave a supply of booklets in the community room at the senior center, (the retirement community or senior apartment complexes) medical facilities, RV dealerships, drug stores, and travel agents that specialize in cruises.

## **12. Put Them on Your Website**

Scan the cover and put an ad for the booklets on your website. Have your web programmer build a small form people can fill out that sends you an e-mail with their contact name. Then send out the booklets.

## **13. Send Them to Other Professionals in Town**

If you want to get referrals from local CPAs, estate planning attorneys, etc., send them a booklet with a cover letter introducing yourself. Then follow up with a phone call and invite them to lunch. The booklet will give you much more credibility than other advisors that compete for the referrals from these people.

## **14. Always Keep a Supply with You to Hand Out**

Keep some in your car, golf bag, flight bag, purse, etc. You never know when the conversation might get around to something covered in your booklet. But don't make it look like you always have a ready supply. "You know, I may just have one of my booklets left from my last seminar in the car." "You know, one of the guys I was supposed to golf with last week wanted a booklet, but he had to cancel. I think I might still have the copy I brought for him somewhere in my bag." (Hint: Keep the booklets in a large Ziploc bag to keep them looking clean and new.)

## **15. Use Them as Business Cards**

They may be bulkier than business cards, but they won't toss them as quickly and they're much more impressive. Say, "I just gave out my last business card but I have a booklet left over from my last appointment." Hand it to them and point out that it has your name and address in the back. The headline will be a great conversation starter. You won't get that from a simple business card.

## **16. Insert the Color Flyer in Every Item You Mail**

Download the flyer from [www.javelinmarketing.com/word/printbooklet.doc](http://www.javelinmarketing.com/word/printbooklet.doc) and have Kinko's or any local print shop print you a color supply. (See Exhibit E.) Send these every time you send any mail.

## Exhibit A

Dear Mr. Jones,

First, congratulations on your appointment to Big Muckity Muck.

The bad news is you'll be busier than ever. If you're like other successful clients of mine, you don't give nearly the amount of attention you would like to your own financial matters.

You probably don't even have time to read my enclosed booklet, designed to help you enormously in avoiding excessive hidden fees in many mutual funds (replace this sentence with the benefit which corresponds to the booklet you are sending).

So, I would like to invite you to lunch on Wednesday, May 15. Over lunch, we can have an opportunity to meet and determine if my ideas or my firm can be of assistance to you.

I'll call to confirm with you.

Sincerely,

John Doe

## Exhibit B

Dear Mrs. Jones,

Thanks for speaking with me on the phone about retirement planning presentations for your employees.

My guess is you have had dozens of calls from financial advisors who want to give such presentations at your company.

Why consider me? I have enclosed my booklets detailing what truly informed investors and taxpayers need to know. They contain some of the most concise, no-nonsense advice and education you will ever see aimed at people age 55 and over. The booklets serve as the outline for my educational class.

So if you'd like your people to be really educated, without a sales pitch, I look forward to hearing from you.

Sincerely,

John Doe

## Exhibit C

FOR IMMEDIATE RELEASE

FOR FURTHER INFORMATION CALL

Your Name XXX-XXX-XXXX

### **“Local Financial Expert Offers Free Booklet to Help Seniors Improve Their Finances”**

Your name, local expert in senior financial issues, is offering a copy of “Mistakes in Selecting Mutual Funds” to those people age 60 and over. The booklet reveals where to watch out for hidden fees and excessive turnover, which lead to higher taxes. The booklet contains numerous suggestions on increasing returns by selecting funds with characteristics that the mutual fund industry rarely mentions. A very clear explanation of sensible alternatives is provided. Readers can get a copy of the booklet by calling XXX-XXX-XXXX.

Your name has published books and booklets designed to help investors over age 55 enjoy a prosperous retirement. He is author of several articles on Estate Planning and is a well-known Bay Area educator having taught such classes as “Retirement Investing” and “Estate Planning” at Humboldt State. He has helped thousands of seniors navigate their financial affairs.

For an interview, phone him at XXX-XXX-XXXX.

###

FOR IMMEDIATE RELEASE

FOR FURTHER INFORMATION CALL

YOUR NAME XXX-XXX-XXXX

## **“Free IRA Distribution Booklet for Retirees”**

Your Name, local expert in senior financial issues, is offering a free booklet to people with large IRAs and age 68 or over who are already or will soon face distribution of their IRA. Those who desire to get a copy of the 18-page booklet “IRA Distribution Mistakes and How to Avoid Them,” may call XXX-XXX-XXXX 24 hours. The booklet reveals:

- Bullet point
  
- Bullet point
  
- Bullet point

Your Name has published books and booklets designed to help investors over age 55 enjoy a prosperous retirement. He is author of several articles on Estate Planning and is a well-known Bay Area educator having taught such classes as “Retirement Investing” and “Estate Planning” at Humboldt State. He has helped thousands of seniors navigate their financial affairs.

For an interview, phone him at XXX-XXX-XXXX.

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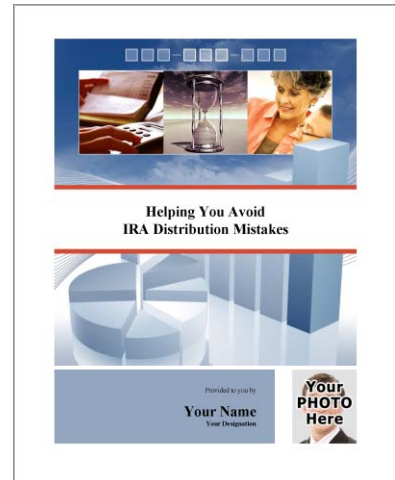


## Exhibit D

**Are You Age 60 or Better?**

**Do You Have \$250,000  
or More in Investments?**

You can get a **FREE** copy of  
*Helping You Avoid IRA  
Distribution Mistakes* from your  
local senior financial expert, **Your Name**.



The booklet shows how any investor can use a systematic investing system to help protect capital gains in down markets yet profit in rising markets. It explains that most mutual funds don't do as well as this simple system.

You can get a **FREE** copy of the booklet by calling **XXX-XXX-XXXX**, or send your name and address to:

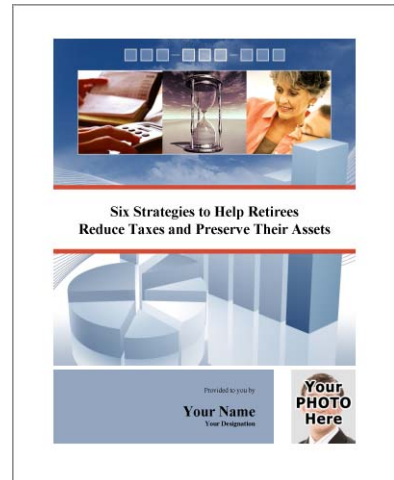
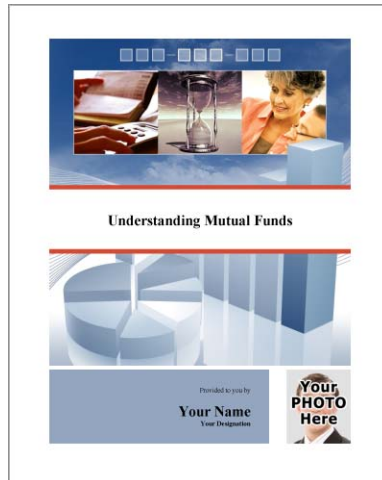
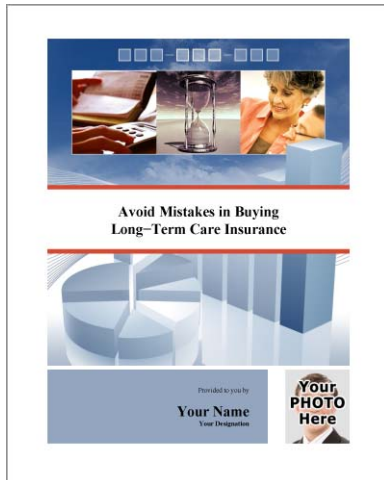
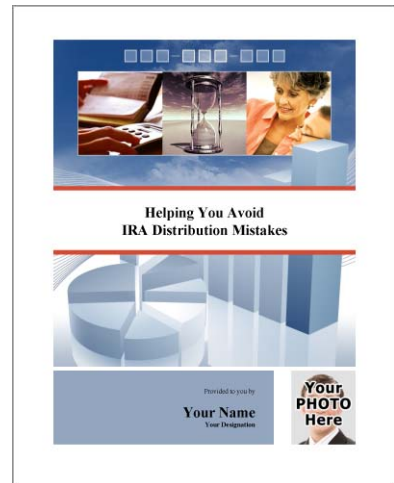
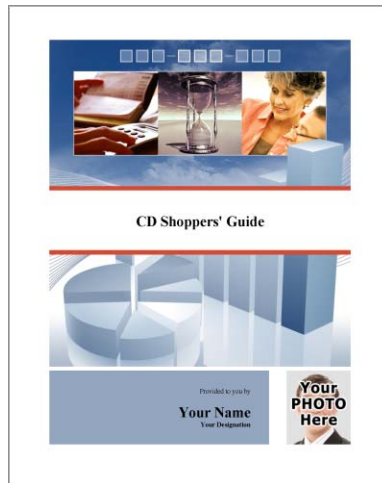
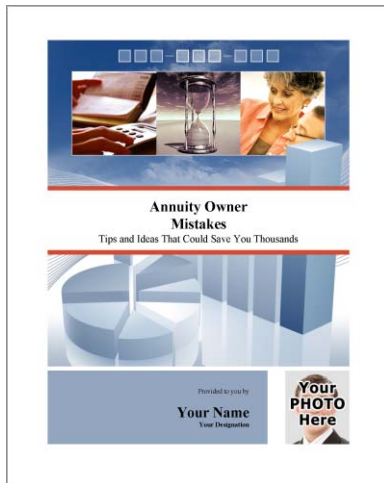
Your Name  
Company Name  
Street Address  
City, State, Zip

(To create the graphic of the book with your name, take your book to Kinko's and have them scan it.)

# Exhibit E

## May I send you any of my booklets at no charge?

Check the booklets of interest and return this form to me at the address below! I am happy to send them.



Financial Advisor Name  
555 Address Street  
Anywhere, USA 12345