

Marketing Materials

Each seminar includes a coordinated marketing campaign that contains the following components:



Flyer



Invite



2 Page Letter



Postcard

Scroll this document to see all marketing campaign components.



How Financial Success Happens

Research has shown that the vast majority of millionaires are fastidious planners, budgeters, and investors. They set a goal, make a plan to reach that goal, then work hard to make it happen.

We want to show you how to develop a sound financial strategy — one that covers all the financial bases, from insurance to investing to estate conservation.

At this educational presentation, we will discuss:

- **Ways to help your money work smarter and harder for you**
- **How to estimate the amount of insurance protection you may need**
- **The true cost of credit-card debt**
- **Three critical components of a sound investment plan**
- **Steps you could take to help manage taxes and potentially increase your net worth**
- **How to calculate how much money you may need to retire**
- **Important estate conservation strategies**

Everyone who attends will receive a full-color, 20-page workbook on financial management. This resource contains a wealth of information — including exercises and questions that could help you assess your current situation and make sound financial decisions. Perhaps best of all, you will be eligible for the complimentary consultation offered to all workshop participants.

Financial Management

sponsored by

(YOUR COMPANY'S NAME)

(BRANCH OR OSJ ADDRESS, IF APPLICABLE)

will be held on

(DAY, DATE)

from (TIME) to (TIME)

at (LOCATION).

Reserve your seat and your full-color workbook today!

Call (YOUR PHONE NUMBER).

Mutual funds are sold by prospectus. Please consider the investment objectives, risks, charges, and expenses carefully before investing. The prospectus, which contains this and other information about the investment company, can be obtained from your financial professional. Be sure to read the prospectus carefully before deciding whether to invest.

(place any necessary disclosure here)

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Preview



**How
Financial
Success
Happens**

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Join us for a special educational workshop.

We will discuss how to develop a sound financial strategy — one that covers the financial bases, from insurance to investing to estate conservation.

Preview

Financial Management

will be held on

(DAY, DATE)
(TIME) to (TIME)
(LOCATION)

To reserve your place, call

(PHONE NUMBER)
by (DATE).

(YOUR FIRM'S NAME)

(YOUR COMPANY'S NAME OR LOGO)
(BRANCH OR OSJ ADDRESS, IF APPLICABLE)

How Financial Success Happens

(DATE)

(NAME)
(STREET ADDRESS)
(CITY, STATE, ZIP)

Dear (NAME):

Research has shown that the vast majority of millionaires are fastidious planners, budgeters, and investors. They set a goal, make a plan to reach that goal, then work hard to make it happen.

We want to show you how to develop a sound financial strategy — one that covers all the financial bases, from insurance to investing to estate conservation.

Please join me for a special workshop, *Financial Management*, on (DAY, DATE) from (TIME) to (TIME) at (LOCATION). This educational presentation is sponsored by (YOUR FIRM'S NAME).

In just one hour, we will discuss:

- **Ways to help your money work smarter and harder for you**
- **How to estimate the amount of insurance protection you may need**
- **The true cost of credit-card debt**
- **Three critical components of a sound investment plan**
- **Steps you could take to help manage taxes and potentially increase your net worth**
- **How to calculate how much money you may need to retire**
- **Important estate conservation strategies**

Everyone who attends this workshop will receive a full-color, 20-page workbook on financial management. This resource contains a wealth of information — including exercises and questions that could help you assess your current situation and help pursue your financial objectives.

The workshop is enhanced with colorful graphics highlighting the latest facts and figures, and you'll find it to be a brief and easy-to-understand presentation. In only about an hour, you will hear how to identify your needs and evaluate your options, as well as how to utilize creative solutions that could help you overcome obstacles as you pursue your goals.

Perhaps best of all, to help make the most of your workshop experience, I'll be offering a complimentary consultation to everyone who attends the workshop. This follow-up meeting is a great way to evaluate your options and to discuss questions you may have after the workshop.

I hope you will take advantage of this excellent opportunity. You are welcome to bring a friend to the workshop. Seating is limited, however, so call (YOUR PHONE NUMBER) today to reserve your place and your workbook.

Sincerely,

(YOUR NAME)

(YOUR TITLE)

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**How
Financial
Success
Happens**

PREVIEW

Join us for a special educational workshop that focuses on sound strategies to help you pursue a comfortable financial future. In about an hour, you'll be able to evaluate your options and utilize creative solutions in areas ranging from investing to retirement to estate conservation.

Financial Management

(DAY, DATE)

(TIME)

(LOCATION)

Call (YOUR COMPANY'S NAME)
at (PHONE NUMBER) to register.

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