horsesmouth®
Helping advisors succeed.

Get ready for tomorrow's clients

- ✓ Offer new client services
- ✓ Deliver year-round communication
- ✓ Be equipped to educate
- ✓ Have access to answers
- ✓ Manage your practice as a business

THE SAVVY SERIES

New Client Services, Tools and Marketing

- Presentations
- Advisor Education
- Client Materials
- Advisor Tools

Help clients manage their financial lives

ADVISOR/CLIENT

New Marketing and Communications

- Strategies and Tactics
- Marketing Kits
- Campaigns
- Client Materials

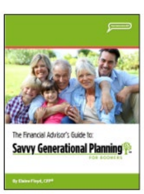
Be the "go-to" advisor in your community

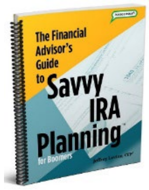
HORSESMOUTH

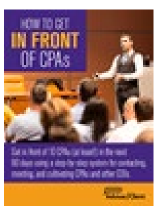
Business Development and Practice Management

- Daily Insights
- Webinars / Podcasts
- Best Practices
- Business Plan Builder

Run your business like a CEO

Program	Technical Resources & Tools	Marketing Materials (FINRA-reviewed)
Savvy Social Security Planning for Boomers ($697 retail)  [Learn more]()	• The FA's Guide to Savvy Social Security Planning (175-pg) • 135 Social Security Questions Answered • Top-rated software • Q&A Forum • Social Security Audit Tool • Twice-monthly newsletter • Members-Only Website • 12 CFP® CE Credits	• Six (6) presentations & scripts • Guide to Social Security handout (50 copies) • Social Security Quick Reference Postcard • Marketing Toolkit • 30+ Brandable Educational Articles
Savvy Tax Planning for Boomers ($697 retail)  [Learn more]()	• The FA's Guide to Tax-Planning Changes Through Four Stages of Retirement (175-pg) • FA's Guide to the New Tax Law (55-pg) • Q&A Forum • Monthly Newsletter • 10% discount on Holistiplan tax planning software • 8 CFP® CE Credits	• Four (4) presentations & scripts • New Retirement Rules handout • Marketing materials • Guide to Taxes & Retirement handout (50 copies) • Retirement Tax Strategy First-Meeting Guide • New Tax Law First-Meeting Guide • 20 Educational Articles • Marketing Toolkit
Savvy Generational Planning for Boomers ($597 retail)  [Learn more]()	• The FA's Guide to Generational Planning (175+ pg) • Orientation Webinar • Legacy/Estate Planning Assessment • Legacy/Estate Planning Checklist • Family Legacy Worksheets • Members-only website • 6 CFP® CE credits	• Four (4) presentations & scripts • Boomers Guide to Legacy Planning handout (50 copies) • Family Guide to Generational Planning handout • 8 Educational Articles • First Meeting Guide • Client Meeting Guide
Savvy Medicare Planning for Boomers ($597 retail)  [Learn more]()	• The FA's Guide to Savvy Medicare Planning (175-pg) • 100 Medicare Questions Answered • Q&A Forum • Twice-monthly newsletter • 10% discount on i65® software • 6 CFP® CE Credits	• Four (4) presentations & scripts • Guide to Medicare handout (50 copies) • Marketing Toolkit • 12 Brandable Educational Articles • Health care Quick Reference Card • Medicare Enrollment Flowchart

Program	Technical Resources & Tools	Marketing Materials (FINRA-reviewed)
Savvy IRA Planning for Boomers ($597 retail)  Learn more	• The FA's Guide to Savvy IRA Planning (200-pg) • 150 IRA Questions Answered • Q&A Forum • Monthly newsletter • Members-only website • Members-only update webinars • 12 CFP® CE Credits	• Five (5) presentations & scripts • Boomers Guide to IRA Planning (50 copies) • New Retirement Rules Postcard • 7 Educational Articles • Marketing Toolkit
Savvy Cybersecurity ($597 retail)  Learn more	• Award-winning book: "Hack-Proof Your Life Now!" • Monthly Newsletter • Emergency-Alert Newsletter • Members-only website	• Five (5) presentations & scripts • Cybersecurity Security Quick Reference Postcard • Cybersecurity Business Protection Checklist • 10 copies of "Hack-Proof Your Life Now!" book • 7 Educational Articles • Marketing Toolkit
Savvy College Planning ($597 retail)  Learn more	• The FA's Guide to College Planning (300+ pages) • 150 College Planning Questions Answered • 15% off College Aid Pro college planning software • Webinar Training & updates • Monthly Newsletter • 9 CFP® CE Credits	• Two (2) presentations & scripts • Key College Funding Card • Guide to Cutting College Costs handout (50 copies) • Marketing Toolkit (75 pg) • 9 Educational Articles • 4 College Planning Reference Lists
Savvy Long-Term Care Planning ($597 retail)  Learn more	• The Financial Advisor's Guide to Savvy Long-Term Care Planning (100+ pages) • Savvy Long-Term Care Planning advisor webinar • Members-only website	• Two (2) presentations & scripts • Getting Long-Term Care Planning Right Handout • Family Guide to Caregiving handout (50 copies) • Client Meeting Guide • Long-Term Care (LTC) Planning Options Client Reference • Marketing Toolkit • Educational Articles

Program	Technical Resources & Tools	Marketing Materials (FINRA-reviewed)
Advisor/Client ($997 retail)  **Learn more**	• Marketing Plan Bootcamp • Niche Marketing program • Annual Trends Review • Monthly Marketing Mastermind meetings • 20+ webinars on marketing topics like lead generation, video, podcasts, webinars & events, SEO, & social media • Monthly Newsletter	• 60+ Marketing Campaigns • 10+ presentations and scripts for clients, prospects and COIs • 100+ Client-Facing Educational Articles • 150+ Emails, Handouts, Postcards • Client Letter Template Kit
Advisor/CPA ($597 retail)  **Learn more**	• Annual COI Marketing Plan • 5+ webinars • COI Reference Guide • CPE Credit Guide • Bi-monthly newsletter	• 7 Presentations to present to CPAs (for them to get CPE Credit) • Key Financial Data Campaign • Roundtable workshop events • Communications program

PLUS:

Horsesmouth Professional Development Service ($247 retail)

- Advisor-facing site with proven advice and 13,000+ articles from 45+ veteran advisors and industry experts offering insights, answering questions, and solving problems
- New content published every business day
- Quick access to thousands of solutions to sticky challenges every advisor faces
- Live marketing clinics, case studies, how-tos, tips, rules, and checklists on all aspects of the business
- On-demand access to more than 40 webinars on topics that drive advisor improvement right now
- Proven referral-building methods that create strong, loyal, happy clients
- Inspiration and motivation that help advisors succeed

horsesmouth®

MASTER MEMBERSHIP

Is the value you offer your clients **fresh, innovative, and unique?**

QUESTION: An affluent prospect is pointed to you and two other advisors in your area: How do you win against your competitors?

ANSWER: Demonstrate you have a unique value proposition by: **1)** Keeping it relevant and fresh by continuous learning from leading subject matter experts. **2)** Delivering educational programs for clients and prospects. **3)** Using financial planning tools to help them make critical financial decisions. **4)** Communicating all of this, all of the time, through all your marketing and communication activities.

Advisors who use the Master Membership bring fresh knowledge, insight, and support to their clients every day.

VALUE PROPOSITION CHALLENGES:

- Referral stagnation—Great planning interactions fuel referrals. Are you prepared to offer all the services your clients want and need?
- Ideal, peak-earning prospects searching for their first retirement advisor—Can you attract them and bring them on?
- “Loyal clients” quietly evaluating you—Do you have the services to help them through a 30-year retirement?
- Frequent government changes on key planning topics—Do you have the latest insights?
- Clients facing new, complex planning issues—Can you help them on these topics?

FOR JUST $3,247 (A savings of $3,667) MASTER MEMBERSHIP INCLUDES:

- **Advisor/Client** ($997 value)
- **Advisor/CPA** ($597 value)
- **Horsesmouth** ($247 value)
- **Savvy Social Security Planning** ($697 value)
- **Savvy Medicare Planning** ($597 value)
- **Savvy IRA Planning** ($597 value)
- **Savvy College Planning** ($597 value)
- **Savvy Cybersecurity** ($597 value)
- **Savvy Long-Term Care Planning** ($597 value)
- **Savvy Generational Planning** ($597 value)
- **What’s Working Now** ($97 value)
- **Savvy Tax Planning** ($697 value)

Master Members get ALL of the programs for one low price!

MASTER MEMBERSHIP: All the technical training, client education, communication, and marketing campaigns for one price, in one place, on one annual billing cycle, for you and your team.

The only program that enables advisors to learn, promote, teach, and advise clients on life's complex financial decisions!

Features of Master Membership:	**Benefits of Master Membership:**
All-inclusive, full access to ALL Horsesmouth memberships…	Answers to clients' questions, even on topics you've not yet studied. Don't let them get answers elsewhere!
More than 29 workshop presentations…	Your brand promise is backed by your ability to teach on a range of critical topics
FREE shipping and 25% discount on print products…	Professionally designed client-facing materials to share with the public
25% off all Horsesmouth advisor training workshops…	Continuous learning allows you stay current at a good price
All new materials every year (FINRA reviewed) regardless of your join date…	You have fresh, growing service offerings always ready to go
One renewal date per year…	No hassles and confusion
Two additional logins for your marketing and administrative staff…	Easy coordination. Always something for staff to work on next.
Get new materials first…	Fresh insights, before the rest
New programs requested by Master Members added every year, all included in your one-price membership…	Add new client services as your value proposition grows
Learn from top subject matter experts…	Know where to turn for answers to clients' tough questions
Extra-low, credited first-year rate for people who hold an active membership in one or more current Horsesmouth programs…	No lost time or value from existing Horsesmouth memberships

STAYING ON TOP OF CURRENT TRENDS

"I started using the Master Membership to increase my expertise in multiple areas and to develop a more comprehensive marketing strategy. I really like the laminated handouts, and the bi-weekly or monthly newsletters for each niche. This really helps me stay on top of current trends. It's very cost effective to get all the programs for one flat fee."

—Laura Basballe, Apple Valley, MN

Add the Master Membership to your business so that your service offerings remain fresh, relevant, and unique…
Request a demonstration or sign up today at Horsesmouth.com/Master, or call (888) 336-6884, ext. 1