At Safe Money Marketing, we have established ourselves as the leaders in high-converting seminar campaigns for the financial services space.

We promote **Safe Money Events** across the country each month, filling them with highly targeted audiences. Here's what makes us different and how you can apply our system to your business with the options that work best for you.

EVERYTHING YOU NEED TO SUCCEED

- ✓ Registration page
- ✓ Email and text reminders
- ✓ Facebook-generated registrants
- ✓ Confirmation emails
- ✓ Scripted presentation included
- ✓ Google Ad Network-generated registrants*
- ✓ Safe Money Ad Network-generated registrants**
- ✓ Success with Seminars best practices guide

*Available at Level 2 and 3 | **Available at Level 3

UPDATED 06.07.23

IAMS | Insurance Agency Marketing Services, Inc.

Interested? Call your marketer today!

800.255.5055

How Safe Money Marketing Works: Trust us to facilitate your seminars with seamless lead gathering, a no-fuss registration, confirmation and reminder process for attendees, and next-level support along your entire journey from the early event planning stages to hosting and follow-up – all for one competitive flat fee (no extra charges or surprises)!

1. CHOOSE YOUR CAMPAIGN LEVEL-UP:

a. All levels include a custom registration page for your attendees, confirmation emails, and email and text event reminders.

b. Levels 2 and 3 include Facebook- and Google Ads-generated registrants.

c. At level 3, we generate registrants directly from our proven Safe Money Ad Network.

2. SELECT FROM FOUR ALWAYS-RELEVANT TOPICS:*

Taxes in Retirement: Provide attendees with critical information on taxation in retirement, including the three basic tax treatments, how to estimate and reduce their tax exposure, and how Social Security fits into their overall taxation picture.

Social Security Maximization: Help attendees understand the decisions that can affect their lifetime Social Security benefit amount, including how to time claiming, new Social Security laws, and considerations for beneficiaries and their spouses who still work.

Retirement Income Planning: Attendees will learn about income planning leading up to and through retirement, including the three basic retirement account types, tax reduction strategies, Required Minimum Distributions, Roth conversions, and other keys to securing their financial future.

Estate Planning with LegacyLock: Show attendees the ease of creating a comprehensive financial plan using LegacyLock estate planning software - and the peace of mind that comes from having their affairs in order ahead of time.

**Customizable PowerPoint presentations are available for each topic on request.*

3. LET US TAKE CARE OF THE REST!

Whether you want to hold a dinner, educational, movie or virtual event, we create your custom event landing page and registration form and use our advertising networks to bring you the most qualified registrants. You get to focus on your presentation and make powerful connections with potential clients that can help you close more sales.