

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
- Client Materials
- Advisor Education
- Advisor Tools

Help clients manage their financial lives



ADVISOR/CLIENT

New Marketing and Communications

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

Be the "go-to" advisor in your community



HORSESMOUTH

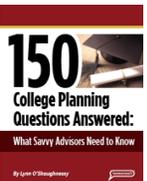
Business Development and Practice Management

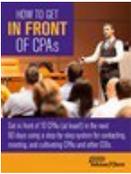
- Daily Insights
- Best Practices
- Webinars / Podcasts
- Business Plan Builder

Run your business like a CEO



Program	Technical Resources & Tools	Marketing Materials (FINRA-reviewed)
<p><u>Savvy Social Security Planning® for Boomers</u> (\$697 retail)</p> 	<ul style="list-style-type: none"> • The FA's Guide to Savvy Social Security Planning) • 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 	<ul style="list-style-type: none"> • Seven (7) presentations & scripts • Savvy Social Security Planning: What Baby Boomers Need to Know brandable handout • Promotional postcards and flyers • Marketing Toolkit • Guide to Social Security handout (50 copies) • Social Security Quick Reference Card • 30+ Brandable Educational Articles
<p><u>Savvy Tax PlanningSM for Boomers</u> (\$697 retail)</p> 	<ul style="list-style-type: none"> • The FA's Guide to Tax-Planning Changes Through Four Stages of Retirement • FA's Guide to the New Tax Law • Q&A Forum • Monthly Newsletter • 10% discount on Holistiplan tax planning software • 8 CFP® CE Credits 	<ul style="list-style-type: none"> • Four (4) presentations & scripts • New Retirement Rules handout • Promotional postcards and flyers • Marketing Toolkit • Guide to Taxes & Retirement handout (50 copies) • Retirement Tax Strategy First-Meeting Guide • New Tax Law First-Meeting Guide • 10+ Brandable Educational Articles
<p><u>Savvy Generational PlanningSM for Boomers</u> (\$597 retail)</p> 	<ul style="list-style-type: none"> • The FA's Guide to Generational Planning • Orientation Webinar • Legacy/Estate Planning Assessment • Legacy/Estate Planning Checklist • Family Legacy Worksheets • Members-only website • 6 CFP® CE credits 	<ul style="list-style-type: none"> • Four (4) presentations & scripts • Promotional postcards and flyers • Marketing Toolkit • Boomers Guide to Legacy Planning handout (50 copies) • Brandable Family Guide to Generational Planning handout • 10 Brandable Educational Articles • First Meeting Guide • Client Meeting Guide
<p><u>Savvy Medicare Planning® for Boomers</u> (\$597 retail)</p> 	<ul style="list-style-type: none"> • The FA's Guide to Savvy Medicare Planning • 100 Medicare Questions Answered • Q&A Forum • Twice-monthly newsletter • 10% discount on i65® software • 6 CFP® CE Credits 	<ul style="list-style-type: none"> • Four (4) presentations & scripts • Promotional postcards and flyers • Marketing Toolkit • Guide to Medicare handout (50 copies) • 12 Brandable Educational Articles • Health care Quick Reference Card • Medicare Enrollment Flowchart

Program	Technical Resources & Tools	Marketing Materials (FINRA-reviewed)
<p><u>Savvy IRA Planning® for Boomers</u> (\$597 retail)</p> 	<ul style="list-style-type: none"> • The FA's Guide to Savvy IRA Planning • 150 IRA Questions Answered • Q&A Forum • Monthly newsletter • Members-only website • Members-only update webinars • 12 CFP® CE Credits 	<ul style="list-style-type: none"> • Five (5) presentations & scripts • Boomers Guide to IRA Planning (50 copies) • Promotional postcards and flyers • Marketing Toolkit • Brandable New Retirement Rules card • Seven (7) Brandable Educational Articles •
<p><u>Savvy Cybersecurity®</u> (\$597 retail)</p> 	<ul style="list-style-type: none"> • Monthly Newsletter • Emergency-Alert Newsletter • Members-only website 	<ul style="list-style-type: none"> • Five (5) presentations & scripts • Promotional postcards and flyers • Marketing Toolkit • Brandable Cybersecurity Quick Reference Card • Brandable Cybersecurity Business Protection Checklist • 10 copies of "Hack-Proof Your Life Now!" book • Seven (7) Brandable Educational Articles
<p><u>Savvy College Planning®</u> (\$597 retail)</p> 	<ul style="list-style-type: none"> • The FA's Guide to College Planning • 150 College Planning Questions Answered • 15% off College Aid Pro college planning software • Webinar Training & updates • Monthly Newsletter • 9 CFP® CE Credits 	<ul style="list-style-type: none"> • Two (2) presentations & scripts • Brandable Key College Funding Card • Guide to Cutting College Costs handout (50 copies) • Promotional postcards and flyers • Marketing Toolkit • 14 Brandable Educational Articles • Four (4) College Planning Reference Lists
<p><u>Savvy Long-Term Care PlanningSM</u> (\$597 retail)</p> 	<ul style="list-style-type: none"> • The Financial Advisor's Guide to Savvy Long-Term Care Planning • Savvy Long-Term Care Planning advisor webinar • Members-only website 	<ul style="list-style-type: none"> • Two (2) presentations & scripts • Promotional postcards and flyers • Marketing Toolkit • Brandable Getting Long-Term Care Planning Right Handout • Family Guide to Caregiving handout (50 copies) • Client Meeting Guide • LTC) Options Client Reference • Nine (9) Educational Articles

Program	Technical Resources & Tools	Marketing Materials (FINRA-reviewed)
<p><u>Advisor/Client</u> (\$997 retail)</p> 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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
<p><u>Advisor/CPA</u> (\$597 retail)</p> 	<ul style="list-style-type: none"> • Annual COI Marketing Plan • 5+ webinars • COI Reference Guide • CPE Credit Guide • Bi-monthly newsletter 	<ul style="list-style-type: none"> • Seven (7) Presentations to present to CPAs for CPE credit • Key Financial Data Campaign • Roundtable workshop events • Communications program
<p><u>Horseshmouth</u> (\$247 retail)</p> 	<ul style="list-style-type: none"> • Advisor-facing site with proven advice and 20,000+ articles from 45+ veteran advisors and industry experts offering insights, answering questions, and solving problems • New content published every business day • Monthly Client Letter you can use to jumpstart client communications • Live marketing clinics, case studies, on-demand webinars, how-tos, tips, rules, and checklists on all aspects of the business • Online Business Plan Builder • Inspiration and motivation to help advisors succeed 	
<p><u>Master Membership</u> (\$3,247 retail)</p> 	<p>Master Membership is the answer for advisors who want to power their business with Horseshmouth. Get all our programs with a single Master Membership. Includes:</p> <ul style="list-style-type: none"> • All memberships—all the technical training, client education, communication and marketing support for one price, in one place, on one annual billing cycle, for you and your team. • A 25% discount off all Horseshmouth products—including Key Financial Data cards and extra Boomer’s Guides. • A 25% discount off all Horseshmouth advisor training workshops, a \$500 savings! • A 25% discount off Horseshmouth’s software partners: College Aid Pro™, Holistiplan, and i65. • All new client materials every year. 	

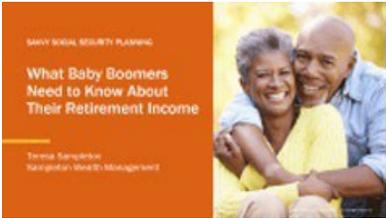


40+ PowerPoint presentations addressing critical client pain points

Horsemouth's various programs include more than 40 scripted presentations covering in-demand topics like retirement planning, tax planning, Social Security, Medicare, IRAs, estate planning, college planning, and more.

All decks and scripts have been professionally researched, vetted, written, and designed. Materials are FINRA-reviewed and updated annually and whenever rules change.

CPAs who attend presentations shown in italics can receive one hour's worth of CPE credit.

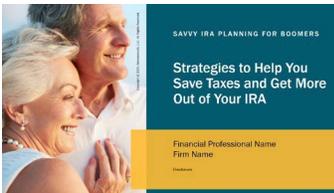
<p>Savvy Social Security</p>  The slide for "Savvy Social Security" features an orange background on the left with white text: "SAVVY SOCIAL SECURITY PLANNING", "What Baby Boomers Need to Know About Their Retirement Income", and "Teresa Sampson Retirement Wealth Management". On the right is a photo of an elderly couple smiling.	<ul style="list-style-type: none">• What Baby Boomers Need to Know to Maximize Retirement Income• Social Security Planning for Women• Social Security Planning for Couples• What's New with Social Security? Eight Topics to Watch in 2025• Basic Rules and Claiming Strategies• WEP and GPO• <i>Savvy Social Security Planning for CPAs (COI presentation)</i>
<p>Savvy Medicare</p>  The slide for "Savvy Medicare" features a photo of an elderly couple on the right. On the left, an orange box contains white text: "SAVVY MEDICARE PLANNING", "Managing Health Care Expenses in Retirement", "What Baby Boomers Need to Know About Medicare and Long-Term Care", and "Financial Professional Name Firm Name".	<ul style="list-style-type: none">• Managing Health Care Expenses in Retirement• 30 Minutes on Medicare Basics• Transitioning to Medicare• <i>Managing Health Care Expenses in Retirement for CPAs (COI presentation)</i>
<p>Savvy Tax Planning</p>  The slide for "Savvy Tax Planning" features a photo of an elderly couple on the right. On the left, a green box contains white text: "SAVVY TAX PLANNING", "How Tax Planning Changes Through Four Stages of Retirement", and "Financial Professional Name Firm Name".	<ul style="list-style-type: none">• How Tax Planning Changes Through Four Stages of Retirement• Client Briefing: What the New Tax Bill Could Mean for You• The New Retirement Rules: Understanding SECURE Act 2.0• The New Tax Law Briefing: 20+ Questions Every Person, Family, & Business Must Answer Soon• <i>How Tax Planning Changes Through Four Stages of Retirement for COIs (COI presentation)</i>

Savvy Long-Term Care



- Getting Long-Term Care Planning Right: New Approaches for People at All Stages
- 4 Keys to Making a Difference in a Family Caregiving Challenge
- *4 Keys to Making a Difference in a Family Caregiving Challenge (COI presentation)*

Savvy IRA & Advisor/Client



- Savvy IRA Planning for Boomers: Strategies to Help You Save Taxes and Get More Out of Your IRA
- The New Retirement Rules: Understanding SECURE Act 2.0
- 6 Retirement Account Options Every Retiree Must Know
- Should I Stay or Should I Go? An Overview of the Factors to Consider When Making Rollover Decisions
- Life After Work: How to Create a Good Life in Retirement (included in Advisor/Client program)
- How to Get Rollover Ready (included in Advisor/Client program)
- Quarterly Market Update Presentation
- *Savvy IRA Planning for CPAs: 10 Things CPAs Should Know About IRAs (COI presentation)*
- *COI Roundtable: Tapping Into Retirement Accounts*
- *COI Roundtable: Navigating the Complexities of the Medicare (aka Net Investment Income) Tax*
- *LinkedIn for CPAs*

Savvy Generational Planning



- Why Estate Planning? Why Now?
- Six Steps to Legacy Planning for the Generations
- How to Plan, Communicate, and Execute the Smooth Transfer of Assets and Values from One Generation to the Next
- *Savvy Generational Planning: Opportunities for Collaboration and Joint Business Development (COI presentation)*

College Planning



- 4 Keys to Cutting College Costs: How to Avoid Overpaying
- An Inside Look at Qualifying for Financial Aid
- *An Inside Look at Qualifying for Financial Aid (COI presentation)*

Cybersecurity

1 Hour to Savvy Cybersecurity



10 Threats Every Person and Business Faces—
and How to Fight Them Now

- 1 Hour to Cybersecurity: 10 Threats Every Person and Business Faces—and How to Fight Them Now
- 30 Minutes to Savvy Cybersecurity: 5 Threats Every Person and Business Faces—and How to Fight Them Now
- Will Hackers Scam Your Business? 5 Threats Every Company Faces and What Executives Should Do to Boost Cybersecurity at Work
- Hack-Proof Your Smartphone
- *1 Hour to Cybersecurity: 10 Threats Every Person and Business Faces—and How to Fight Them Now (COI presentation)*

Master Membership



- From Dream to Doorstep: Mastering the First-Time Homebuying Journey