RothReady™

How Advisors Can Fully Leverage The Roth Conversion Market Opportunity

2026

Opportunity Of The Year

5X Your FIA Sales With The RothReady Marketing, Sales & Tech System Designed Exclusively For Roth Conversions

Why Target The $30T Roth Conversion Market?

- **IRA Owners Face A Massive Tax Bill** On their IRA's & are motivated to convert to a Tax Free Roth.
- **Roth Conversions Are An Underserved Market** Because Advisors have not ha access to the right tools or systems to MAXIMIZE Roth conversion results for their clients.
- With historically low taxes it's likely that, **Taxes Will Increase In The Next Few Years**

Our Roth Conversion Formula To Help You 5X Your FIA Sales

- **RothReady Has A Proven, Turnkey Roth Conversion Marketing & Sales System** That's built using a chronological order that moves prospects through a digitally driven process to save you time.
- **Advisors Get A Co-Branded RothReady Landing Page** That educates, informs and positions you as a Roth conversion expert and makes it much easier for you to make sales.
- **Marketing Automation Slashes Your Sales Cycle Time By 50%** While keeping your prospects informed and engaged throughout the entire sales cycle. Radically reduces manual follow-up. Less time wasted chasing clients, our system follows-up for you, saving you valuable selling time.
- **Our Proprietary Roth Roadmap Software** Calculates a broad spectrum data points, many that are not found in other Roth software's in the marketplace.
- **Our Done For You, Done With You Process:** Our Roth-Pro prepares all prospect reports for you and joins your sales appointments as needed to answer prospect questions & **Help You Close Deals**

What's In Your RothReady Marketing, Sales & Tech Stack?

- **Your Co-Branded Landing Page** Sends prospects thru a link, or QR code that you include in an email, seminar or webinar to introduce & inform your prospect about Roth conversion concepts.
- **The RothIQ Quiz** Is accessed by your prospect at the bottom of your co-branded RothReady landing page. The RothiQ quiz functions as a guided intake and **Automated Fact Finder** that collects key financial & tax related information, so you don't have to.
- **Our Tax Savings Snapshot & Roth Roadmap: Is A 100% Done For You Process** Our Roth Pro generates your prospects tax savings snapshot, that illustrates a BEFORE & AFTER tax savings comparison of their current IRA. After the snapshot review appointment, you select the annuity that best matches the client's needs and goals and our Roth pro will prepare the client's Roth Roadmap, using the specifications of the selected annuity.
- **The RothOS Tech Stack:** Includes a centralized advisor dashboard to track your prospects and clients from their initial interest to ongoing service. Plus, **Ongoing Automation & Nurturing** campaigns helps your prospects stay informed & engaged throughout the entire sales cycle.
- **Done With You Services:** Our Roth PRO is available to be on appointments with you and your prospect to walk through the details of their **Tax Savings Snapshot & Roth Roadmap** and answer any technical questions to help support your sale.

Be Ready When An IRA Owner Wants A Roth Conversion

- Thinking Of Doing Roth Conversions Or Already Doing Them? **The RothReady system makes your job easier, with less manual follow-up.** Get signed up with RothReady, so we can help you with your next Roth conversion and remember we don't get paid until a sale is made!

- **Onboarding Is Done On A First Come First Served Basis** So don't wait until you have an IRA prospect in front of you to get signed up. With your onboarding out of the way, you'll have full access to your Agent Dashboard, Funnel, + Roth Pro sales assistance BEFORE you need it not after.

- **Never Chase Prospects Again:** That's because marketing automation does much of the chasing for you and IRA owners are motivated to reduce taxes on their IRA's. Imagine what your life would be like if you never had to chase clients again? Get started with RothReady and find out!

What Does It Cost To Leverage The RothReady System?

- **Get Lifetime Access For A One Time Fee Of Only $1,500** That means you'll get full access to the RothReady marketing, sales and tech system and never pay again.
- There are **NO Monthly Fees,** Bootcamps or complicated onboarding. You'll be onboarded & get access to RothOS & our Roth Pro in just a few days, so you can get into sales right away.
- **You Get 80% Of The Annuity Sale** We don't believe in charging advisors ongoing fees, especially if they are not making sales, so assuming that an annuity is a good fit for the client, we go on the application for 20% and you keep 80%. We only get paid when a sale is made, That's the RothReady Advisor advantage.
- **If You're Not Currently Contracted With IAMS** To take advantage of this program, contact IAMS to find out what contracts you need to move.

- **Remember, We Don't Get Paid Until A Sale Is Made**, Just one FIA sale can pay for the RothReady platform many times over!

Book Your Call To Reserve Your Spot

Got Questions? Contact us at Hello@RothReady.com

Advisor Signup Page: www.RothReady.com/Ascend