



MARKETING MENU



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INTRODUCTION

At Tucker Advisors, we don't believe the one-size-fits-all model belongs anywhere in the financial industry. Not on the sales side and certainly not on the marketing side, either.

That's why we try to customize the marketing services listed in this brochure to each individual advisor's practice. This includes consultations with advisors about what is the best fit for their needs and, much like they tell their clients, why it's important to develop a plan when it comes to marketing.

Any esteemed field marketing organization should provide its advisors with a roster of marketing services designed to enhance their outreach and client engagement strategies. But that means nothing without taking into consideration the proper context of the advisor's marketing needs. We believe marketing support is just as important, if not more, as offering a comprehensive platform of modern marketing services.

We work with our advisors to ensure the marketing services here are employed the right way at the right time and context, so that they empower our financial advisors to build their brand, attract new clients, nurture existing relationships, grow their practices and stand out in our highly competitive industry.

BASIC SEMINAR

Supply Bundle

The Seminar Supply Bundle provides all of the marketing assets you need to get started with your seminars at a discounted price.

Remember to place your order no less than **3 weeks** before your event!



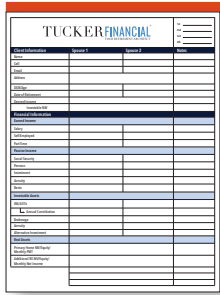
GENERIC FOLDERS



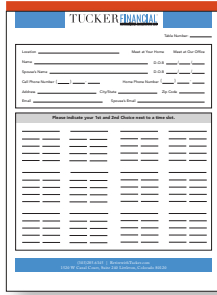
ADVISOR BIO PAGE



WELCOME LETTER



FACT FINDER



APPOINTMENT SHEET



SMALL APPOINTMENT BOOKLET

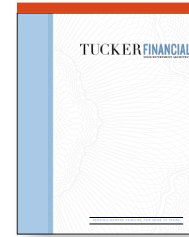


TABLE NUMBER CARDS

KARLAN TUCKER'S Seminar Supply Bundle

Karlan Tucker has proven his success at his live seminars by being prepared and presenting professionally. Below are the basics you need to present like Karlan.

All materials will be branded with your company logo, theme, and colors!



WELCOME FOLDER



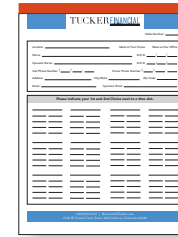
CUSTOM CATALOG



WELCOME LETTER



FACT FINDER



APPOINTMENT SHEET



KIPLINGER'S HIGHLIGHT

AT THE SEMINAR



PULL UP BANNER



TABLE NUMBER CARDS



WRITING PENS



APPOINTMENT REMINDER CARDS



6-FOOT TABLECLOTH

SEMINAR COACH

If you look back on the last few seminars you conducted, could you honestly say that you booked an average of 70% of the prospects in the room into appointments? Most people would have to answer “no.” And that’s where we can help. Did you know that our coaches can talk to your prospects before the seminar and even help you book them into appointments after the seminar is over?

Not only do we provide you with the one-on-one coaching to boost your booking percentages, we also position you for success by making prospects feel comfortable enough with your practice to schedule appointments—and these are qualified appointments, not Facebook leads or online “commitments”—all you need to do is close.

Brad Smith is a member of Tucker’s Client Services division and is committed to accurately informing people of their many choices when it comes to retirement income strategies. He has gained great satisfaction in helping people retire with the peace of mind that secure income delivers to them. Brad has always believed in striking a balance between risk and safety that fits each individual client’s portfolio.

In addition to servicing his own clients, Brad also enjoys hosting retirement dinner-seminars for many of the top advisors in Tucker’s national network. As a seminar coach, he is an “advisor’s advisor,” assisting financial advisors in communicating how they can best serve their audiences.



BRAD SMITH

CUSTOM LOGO

Your logo is the face of your company. Often, it's the first impression a client has of you and what you stand for. Is your logo sending the right message?

Our Marketing Developer will walk you through the process and work with our team of designers to capture the look and feel you want your logo to represent. With the ability to provide input through every stage of the design process, we are able to fine-tune the design to perfection.



CUSTOM WEBSITE

Want to bring your practice into the digital age but not sure where to start? With our custom sites, Tucker Digital does all of the heavy lifting, leaving you with a new, beautiful home on the web.

We build our custom websites with original content, as well as provide malware security and an annual secured socket layer certificate for as long as the site is hosted with Tucker. The website is owned by the advisor, who can choose to move the site to another hosting service at any time.



CUSTOM EMAIL SIGNATURE

In today's digital world, your email signature is more than contact information; it's your professional identity and a powerful branding tool. Invest in a branded signature to leave a lasting impression in every email and build trust. Here's why having a branded email signature is crucial:



- Legitimacy
- Professionalism
- Branding
- Digital Business Card

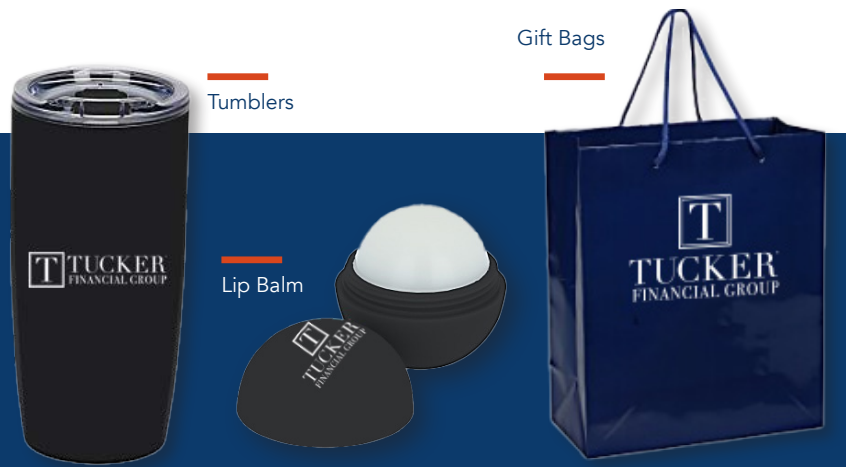
- Custom Design
- Links to Website
- Logo Included
- Network Logos



CELEBRITY BRAND DESIGN

Contact Your Marketing Developer for Pricing

From pull-up banners and water bottles, to stress relievers and branded materials, Tucker Financial Group wants to help you take your company brand to the next level.



CUSTOM DESIGNS

LSEO AND BRAND PROTECTION



- Make sure your website, ads and online content meet the optimal criteria of search engines.
- Ensure that your practice shows up at the top of search results.
- Get protection from businesses trying to manipulate your brand or name for their own search-result rewards.
- Learn how you can drive traffic organically, without having to buy your results.

SOCIAL MEDIA AD CAMPAIGNS

- Reach your audience online.
- Target prospects in your ideal age range and geography.
- Build awareness of your business.
- Learn how to turn prospects into clients.
- Drive traffic to your point of sale.
- Offer resources your ideal client can't help but click.



Your marketing developers can help you through the entire process.
Don't hesitate to give them a call. (800) 734-0076

DIGITAL MARKETING

INTERNET LEADS

TheAnnuityLeads.com

- High-quality leads that come from multiple media platforms, such as radio, TV, and online campaigns.
- Leads are exclusive and fairly priced.
- Contact: (888) 288-1712

Financialize.com

- Leads come from high-quality websites that they control.
- Sign up, choose your territory, and set your monthly budget.
- Receive real-time notification when each exclusive lead is assigned to you (with notes).
- Contact: (707) 590-2600



ON-DEMAND SEMINARS

Short, animated videos consumers can watch from home



- Six to choose from:
 1. "How to Maximize Your Retirement Readiness" (3:35 min.)
 2. "How to Increase Social Security by as Much as \$250,000" (2:46)
 3. "Women & Wealth" (3:54)
 4. "Estate Planning Wills & Trusts" (3:35)
 5. "Tax-Free Retirement" (3:49)
 6. "Guaranteed Income for Life" (3:44)

>> <https://tuckeradvisors.com/lead-generation/>

DIGITAL MARKETING

CUSTOM WEBSITE CONTENT

We build our custom websites with original content, as well as provide malware security and an annual secured socket layer certificate for as long as the site is hosted with Tucker.

CONTENT MARKETING

SERVE.

- Stay in front of your clients with consistent communication and educational content.
- Build and maintain enriched and lasting client relationships, without a huge effort on your part.

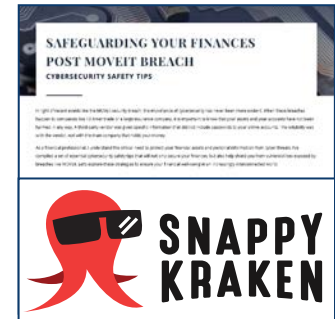
EXPAND.

- Deepen relationships and build trust with your existing network.
- Stand out as a thought leader and build authority with the perfect balance of content and communication.

GROW.

- Increase traffic and conversions across your website and entire marketing system.
- Grow your firm with referrals, increased traffic, and new client relationships.

>> Learn more at www.SnappyKraken.com



KIPLINGER'S MAGAZINE



Contracted advisors with Tucker enjoy an opportunity to brand their practice in "Kiplinger's Personal Finance," perhaps the most trusted financial advice magazine in the U.S. In the popular "Kiplinger's Retirement Planning" annual issue, Tucker offers advisors the chance to appear in a two-page spread highlighting "America's Retirement Experts."

Each expert advisor is featured with a head-shot photo and a bio, which Tucker's Senior Content Specialist/Editor writes for the participating advisors after conducting a short interview with them. Each advisor also receives 25 copies of the magazine after it publishes. The branding authority that comes from an appearance in Kiplinger's delivers credibility and can be used with advisors' various marketing effects.

COPY WRITING

SHOWCASE VIDEO



- Our video team reviews a questionnaire script and filming agenda with you to meet your approval, travels to your location, and creates a state-of-the-art professional video that summarizes all you and your practice offer in the best light.
- The Showcase Video is an advanced marketing tool for advisors to use in getting their brand before prospects.
- Research shows that multi-sensory messaging like video—where two or more senses of the people receiving the message are engaged—delivers far better results for the reception and

retention of your brand. In other words, video stamps itself in people's minds.

RETIRE HAPPY HOUR

- Allows you to showcase that you were "Seen on ABC, CBS, NBC and FOX".
- Filmed and aired once a quarter.
- 5–7-minute interview with a Tucker Advisor.
- Public Relations and Branding.
- Become a local celebrity in your community.



VIDEOGRAPHY

TELEVISION

Advisors are still able to locate one of the largest marketing audiences through the medium of television. But beyond this, there are many ways to use the medium to your benefit, and they do not have to be the most expensive option.

At Tucker, we think of television spots in terms of messaging reach and brand capital. The former can truly be expensive if advisors choose to buy in a prime time or during a broadcast with a large viewing audience. The latter can be relatively cheap.

Tucker also produces 15-, 30- and 60-second television ad spots for advisors. For advisors who are interested in their own television show, Tucker can handle all facets of the show's production, as well as customize the show content to the advisor's practice.

Sponsorships of television programs deliver a visual marketing opportunity for advisors that allows viewers to see company logos and/or messaging. In this scenario, viewership numbers are as important as the programming that advisors choose to sponsor.

Television remains a medium of unlimited potential, whether advisors seek to use it for messaging or as a branding tool. Tucker has the experience to produce a television experience for advisors that directly fits their needs and purposes.

Your marketing developers can help you through the entire process.
Don't hesitate to give them a call. (800) 734-0076



RADIO ADS

- Proven ads that top advisors like Karlan Tucker are running today.
- Use your own voice or our radio personality.
- Cost depends on city, state, radio station, and when the ads air.
- Applicable to current times.
- Insurance- and RIA-compliant friendly.



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