



**THINK CONVERSATIONS
ABOUT WILLS, TRUSTS
AND PROBATE ARE
ONLY FOR
THE ULTRA-RICH?**

THINK AGAIN

ADD REAL VALUE WITH ENHANCED PLANNING.

People tend to tune out when they hear “estate planning” – after all, they’re not the Rockefellers, are they? But the truth is that a bit of what we call “enhanced planning” could have far-reaching benefits to many of your clients and prospects — benefits like preserving family harmony, avoiding unnecessary taxes and leaving a meaningful legacy.

As a financial services professional, enhanced planning gives you the chance to add value beyond your competitors, become more referrable and encourage multi-generational planning. It’s also a great way to uncover additional assets and start prospects on a path to creating a financial strategy.

ENHANCED PLANNING: PROTECT YOUR LEGACY AND PRESERVE FAMILY HARMONY MARKETING SYSTEM

In addition to introducing clients and prospects to the five-step New Generation Retirement™ system, this marketing system can help answer questions like:

- What critical documents should I complete?
- When I die, will everything go to my spouse?
- How can I protect my children from a previous marriage?

TURNKEY MARKETING RESOURCES AVAILABLE TO YOU:

- Seminar PowerPoint
- “The Big Picture” interactive seminar tool
- Seminar response form
- Seminar invitation content
- Seminar registration page content
- Seminar email and social media invitations
- TV and radio ad scripts (not seminar-specific)
- Email and social media campaigns (not seminar-specific)
- Ownership considerations flyer
- Enhanced Planning: Protect Your Legacy and Preserve Family Harmony consumer video
- A Guide to Trusts (for FSP use only)
- The Do’s and Don’ts of Enhanced Planning (for FSP use only)
- [Estate Plan Navigator](#) with subscription coupon code, Gradient20

Enhanced planning training now available

These clear, easy-to-understand videos and follow-up learning assessments help you stand out by preparing you to give clients and prospects the information they didn't know they needed!



QUESTIONS?

CALL A VP OF MARKETING

TODAY AT 800.407.4137!