

Marketing Your Practice



The Wealth Preservation Institute

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Traditional Marketing



- Word of mouth between clients/friend
- Post card mailers (many coupled with plate licker seminars)
- Yellow pages
- SEO/internet marketing
- Radio ads
- And so on...

Who are you bringing in with your marketing?



- Retired seniors?
- Those just out of college?
- Middle class married couples with kids?
- Unless your seniors have \$250,000+ in IRAs or brokerage accounts, they are not great clients.
- Young clients with no money are not great clients
- Middle class couple with kids even if they are a dual income household are not great clients.

What kinds of clients do you want?



- Those with money
- Those who can benefit from
 - Estate tax planning
 - Income tax planning
 - Buy/sell planning
- Who are they?
 - Profitable small, medium, and large sized business owners.

Who has the clients you want?



- CPAs/EAs/accountants
- Their clients consider them the “trusted advisors.”
- If you can get in with CPAs/EAs/accountants and have them trust you, then you are on your way to growing your business with the clients you want.

What's the problem with CPAs/EAs/accountants?



- The **don't trust** financial planners.
- They **don't trust** insurance agents.
- They **don't understand** life insurance or annuities.
- They've **lost clients** because they've referred them to someone else provide services the CPA doesn't provide.

Overcoming objections



- Have them view you as the expert.
- Educate them on concepts/products they are not familiar with.
- Educate them on concepts/products that can save their clients money (taxes).
- Educate them on concepts/products that can save their clients from losses in the stock market.
- Overall, show them that you can help them provide better advice to their clients and advice they really should be giving in what many be seen as a fiduciary setting.

Become the expert



- How to posture yourself as the expert.
- It's simple.
- Be able to offer Certified Professional Education (CPE) credits to them where YOU are the EXPERT speaker giving the seminar and providing the credit.

How do you become the expert?



- Through **The Wealth Preservation Institute** (www.thewpi.org), you can be certified to give over **45+ hours of CPE** to CPAs/EAs/accountants in your local area.
- What does that mean?
- It means that if you are on board this platform you can market yourself in your local area as an accredited CPE provider.

Logistics



- Advisors try to make this more difficult than it is.
- The WPI is approved by NASBA (National Association of State Board of Accounting).
- Advisors the WPI believes are capable of providing qualified education can be appointed to do so.
- There is NO formal process.
- In other words, if I think you can go a good job educating on a subject, I can approve you to go give CPE in your local area.

What topics?



- All those covered in the CWPP™, CAPP™, and CMP™ courses.
- www.thewpi.org/cwpp
www.thewpi.org/capp
www.thewpi.org/cmp
- Asset protection, estate planning, 401(k), 412(e)3, cash balance plans, captive insurance companies, annuities, life insurance, Medicaid planning, life settlements, disability, LTC, etc., etc., etc.

Qualifying advisors to give CPE



- If you have taken and passed modules in the CWPP™, CAPP™, or CMP™ course, then you are good to go to give CPE on the ones you've passed.
- Do you have to take an entire course to be able to give CPE seminars on 1-2-3 module in the course?
- No. You can test on only those areas you want to give CPE seminars.
- However, I do recommend that all advisors take these courses simply because doing so will allow you to give the best advice to your clients.

Presentation Material



- All you need are PowerPoint presentations to give CPE seminars.
- I have them on all the subjects offered.
- I also have the written course material that goes along with the PowerPoints but that is not necessary to give CPE and I'm not giving that out for free.

Other subjects



- Could I allow an advisor to give CPE on other subjects?
- I could.
- The WPI is certified to give CPE on any subject it deems appropriate.
- I would need to work with an advisor to get a new program in the right form and fit it into the right class of education and then it could be offered.
- I'm not overly interested in doing this, but for certain advisors I would consider it.

Can you charge for the seminars



- Yes, and I recommend it.
- Free seminars are not perceived with much value.
- I recommend charging something, even if that is only \$5 or \$10 an hour.
- CPAs are used to paying \$10-\$20 an hour for seminars put on by CPA or accounting societies.

How does the WPI recommend using the educational platform?



- You can do them in local hotel conference rooms.
- You can do them on a Saturday and offer 8 hours of ed.
- You can put an add in the paper or local trade journal.
- However, I recommend you contact CPA offices (5-30 in size) and see if they would like you to come in once a week for an hour to give a lunch seminar.
- Or I recommend the same and have them come in early one morning a week for an hour's worth of ed.
- The goal is constant contact with the CPA office not necessarily a one time hit to get them credits.
- Over time you will form a trusted relationship and you will get business out of it.

Marketing Mojo



- Just saying on your web-sites or correspondence that you can give CPE credit is powerful and worth signing up for this marketing platform.

What are the costs to give CPE ed. Through the WPI?



- \$2,500 annually.
- Advisors who place “all” their fixed life and annuity premium through the IMO I work with can get access to the CPE marketing platform for **FREE**.
- If you do not want to place “all” of your fixed business through the IMO I work with, you will have to commit to putting **\$2.5 million dollars in annuity business** through the IMO and/or **\$100,000 worth of target life** insurance business (or some combination thereof).

What are you going to do different over the next 12 months?



- Are you going to break from tradition and try something new?
- Or are you going to go down the same path you've always gone down?
- Everyone knows the definition of insanity.
- Don't you want to start working with affluent business owners?
- This is your ticket to get into that market.
- And this platform doesn't have to cost you a dime.

What are you waiting for?



- Because there is literally no risk, no downside, and no cost to use the WPI's CPE platform, what are you waiting for?
- If you are interested in using this platform, e-mail info@thewpi.org.

More Marketing



- If you want to look at 25k worth of other marketing tools, go to www.strategicmp.net and click on the appropriate link on the left.
- You can get most of these tools for FREE if you are working with the right IMO.
- There you will find information on the following tools:
- Ghost web-site (unique content with flash videos)
- An e-mail dripping system (with the newsletters)
- A CRM system (my version of Salesforce.com)
- Roth conversion software (what I call the only accurate software out there)
- Retirement Life software
- And many more tools

Questions?



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