

## **The Prospect Marketing Video: A Seminar Alternative**

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Even though seminars remain a very effective way for financial advisers to introduce their services to potential clients, it is a prudent step to diversify your marketing techniques. One way to diversify your marketing is to use a professionally produced marketing video. An educational video is, in essence, like a mini-seminar.

The video can be offered to prospective clients in a number of ways:

- At a seminar for the friend or spouse who couldn't attend
- With an ad in the local paper
- Handed out in person as a "Super Business Card"
- Handed out to clients as a referral "enabler"

In my personal financial planning practice, I have found this type of alternative, supplemental marketing is helpful in attracting prospective clients. It is also a very good way of building credibility.

Just like a seminar, the educational video needs to do two key things:

1. Demonstrate capability and expertise.
2. Give the prospect a positive impression of the adviser.

Like a seminar, the video should also be designed to pique the interest of the prospect without giving away all the information, and it shouldn't be very long in length. And, just like a seminar, the purpose of the video is to get an appointment with the prospect.

Obviously, you don't want the presentation to look like it was shot with a handheld camcorder. There are two routes you can take to get a professional video. First, you can contact a video production specialist in your area. Someone who produces commercials would be a good place to start.

Second, you can contact annuity marketing organizations (AMOs) to see if they offer such a video for their agents. My AMO offers a supply of these prospect marketing videos to its agents at no charge. They have been produced at the AMO's expense and feature the "Seven Deadly Sins of Retirement Planning<sup>SM</sup>." The videos are individually packaged and have a spot on the front of the jacket cover for the agent's business card. If an agent wants to get a personalized version, the AMO can arrange for a video shoot featuring the agent.

Though there are many marketing tools and techniques to choose from, using a prospect marketing video as a seminar alternative (or supplement) may be just the product you need to add greater success to your practice in 2008.

**About the Author:** David D. Holland is an independent financial planner/investment adviser/annuity agent in Ormond Beach, Florida. In 2007, David teamed up with industry veteran, Mike Mastowski, to establish Retiree Adviser Marketing Corporation (RAM). RAM provides independent agents with access to high quality annuity products and helps them expand their services to include real retirement advice. RAM also gives agents the opportunity to access David's marketing and planning system – the same system which allowed him to achieve such an uncommon level of success in his own personal practice. The RAM System includes: A Proven Seminar System (slides, script, invitation, prospect interview questionnaire and seminar training video), a Prospect Marketing Video and a Client Planning System. To get more information about RAM's services, agents are invited to call 888-422-7007 or visit [www.retireeadviser.com](http://www.retireeadviser.com).