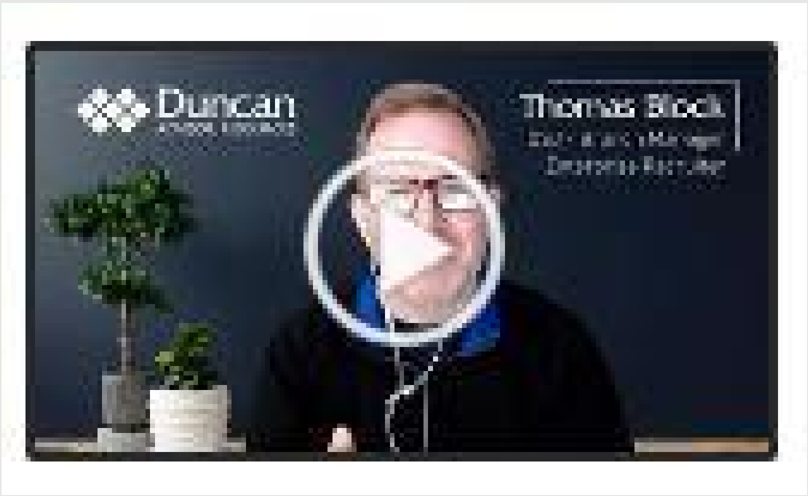
Weekly Rep Call

December 6th, 2023

Today's Rep Call

Click the button below to view the recording of today's rep call.

Call Notes (Click on the red links to learn more)



Do YOU have a topic you would like discussed on the next call? Let us know! Contact your OSJ, or reply to this E-mail

Upcoming Rep Calls

Rep calls are happening every Wednesday (Except the week of the Annual Branch Meeting) and we are working hard to fill the schedule.

SPECIAL CALL December 7th 1pm EST- Bond Buying 101 with AAM
Zoom Link
Outlook Calendar Reminder

December 13th- Nitrogen Wealth with Daniel Michaelsen

December 20th- NO REP CALL

December 27th- NO REP CALL

2024 Annual Branch Meeting

We are excited to announce that the 2024 Annual Branch Meeting will be held at the beautiful Omni Amelia Island in sunny Fernandina Beach, FL . This meeting is designed to meet the needs of our financial professionals and will offer educational sessions on products, marketing and sales, marketplaces trends, and more. Plus a backdrop of the beautiful sunrises.

We are sending this communication out early for some important logistical items to pay attention to:

1. Flying into Jacksonville Airport is your best option
2. There is a PGA tournament that weekend - Review your travel options now
3. If you need a rental car, we would recommend getting that reserved now since those will be taken quickly with the tournament

We are looking forward to hosting you for this annual tradition like no other!

You can Register Today!
You can get your Hotel Room Today

CJ's Compliance Corner

End of year housekeeping:

- FINRA CE - Due by December 31st
- Registration Renewals - Due by December 13th
- Cashiering cut-off dates
- NFS/FCCS gifting cut-off dates

Around the Product Block

Annuity Options to Consider in 2024

I got a chance to catch up with our good friends at CreativeOne this week to discuss where the annuity flows are going. Here are some products Financial Professionals have been gravitating towards.

RILA Investment Only:
Global Atlantic ForeStructured Growth
Athene Amplify 2.0

RILA With an Incomes Rider:

Equitable SCS Income
Brighthouse Shield Level Pay Plus

FIA:
Corebridge and Allianz products are getting the most flow. They have a number of options in this category and highly competitive for accumulation and growth.

Feel free to reach out to me to discuss these options.

DWA Fund Change

On Thursday, November 30th we executed a swap out on the 6 Active Funds in the Emerging Markets asset class.

Out:
Baron Emerging Markets I BEXIX

In:
Cullen Emerging Markets High Div I CEMFX

For questions on the reasoning for this change, please reach out to **Tom Walsh**

Colleen Bell & Jeff Vivacqua Webinar

Are you striving for growth in your practice, only to get pulled back into the role of running the business side again and again? You're not the only one.

Finding balance between the dueling roles of being an advisor focused on growth and a business owner is a common challenge. Join us as we discuss how to approach growth with intention, so you can find a better balance to achieve your goals.

Presented by Financial Advisor Magazine, join Colleen Bell, President, Innovation and Experience and Jeff Vivacqua, President, Growth and Development for this discussion
Dec 7th, 2023 02:00 PM EST **Register Here**

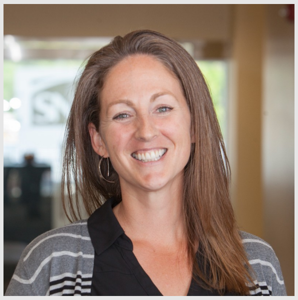
YCharts Signup

Last call!!! If you want to take advantage of the free YCharts access to presenter mode, email me right now. It will only last through the end of December, but take the time to understand how this tool works especially in comparison to Morningstar's option.

Need CFP Credit?

Our friends at FS Investments are holding a Introduction to Private Equity webinar on Thursday, December 14th at 4pm EST. This webinar is good for 1 CE credit.

Registration can be found **here**



Bill Good Marketing

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Head of Growth
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BIG OFFER ANNOUNCED DURING THE CALL!

The terms of the discount are $750 off a full BGM System package, which includes licensing, training, onboarding and launch support, and an initial year of content and success coaching.

The CRM can be included in that package too, but is not required. We can support advisors who are using other CRMs as well if they're married to their current CRM.

Increase your Revenue with Exceptional Content

Our job here at Bill Good Marketing is to help financial advisors and their teams reach their goals faster. Whether your goals involve helping more people, more money, or more time to pursue your other goals in life, we can help!

If you're interested in learning more, I'd love to have a chat about your goals and share ideas that can help you reach your goals faster, too. Please feel free to schedule a time to chat at your convenience. Here's a link to my calendar: https://calendly.com/stephpeterson/zoom-30-discovery

In the meantime, I'd like to share some info for your reading pleasure! 😄 Here's a bit about the information attached:

BGM System Overview. This is a reasonably brief description of our system. The key word here is “system.” We don’t just sell programs, content, practice management, sales training, or anything else. Rather, we have put together data management, client marketing, prospecting, and practice management and made a system designed to make your business scalable, not just a program.

Content Is Still King. This is a selection of ten of our letters. As part of your marketing strategy, we still highly recommend letters. Especially ours. We recommend them because people read them and become engaged. Engagement = increased business and revenue. Great content focuses on interests, pain points, challenges, and solutions. When you read some of our letters, you will see they do just that.

Last, but not least, here's a link to our client success page: **Client Stories**. On this page you'll see and hear many reports of the 2-year revenue "Double" and the working less solutions we're most well-known for.

Bill Good Marketing Presentation
Content is Still King
BGM System Overview

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