

Client Direct Program

Are you looking for a way to stay in touch with your clients? Do you have a prospect list that you want to continue to mail? GamePlan has developed a drip mail program that accomplishes just that.

Your clients and prospects could receive something from you every month to remind them that you're available to review and develop retirement plans. And the more you stay in front of them, the more business could come your way in the form of add-ons and referrals. All you need is a list of at least 200 names and addresses. If you have more, even better because there is no maximum to how many we'll mail for you.



What You'll Receive:

A predetermined direct mail piece will be sent monthly to a minimum of 200 clients and/or prospects. 12 monthly mailings are broken out as follows:

January – Annual Review Letter

February – EIA Newsletter

March – All About IRAs

April – CD Rollover Letter

May – Reaching Retirement Newsletter

June – Legacy Planning Letter

July – Trust Basics Newsletters

August – Tax Review Letter

September – Leaving a Legacy Newsletter

October – CD Rollover Letter

November – Thanksgiving Letter

December – Charitable Giving Letter

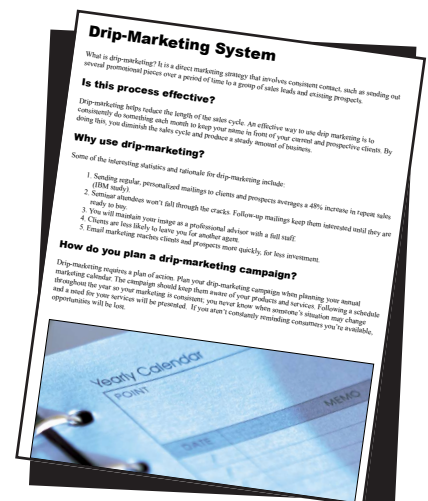
In addition to the 12 pieces above, a birthday letter will be sent to every client name 2 weeks before the client's birthday (provided a birth date is provided). All personalized pieces will contain the agent's name, company name and telephone number. They will be laser printed on 8 1/2" x 11", 4-color letterhead and mailed standard rate, in a full view envelope.

Criteria Used for Leads:

Data that you provide. (minimum of 200 names, no maximum)

Qualifications:

\$300K issued in Allianz and/or ING annuity business, including add-ons. Issued business qualifies during any consecutive three-month period.



Call for more details!

800-886-4757



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