



**TUCKER**  
FINANCIAL GROUP®

# **IN-DEPTH MARKETING & SALES SERVICES**

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EVERYTHING YOU NEED TO HELP YOUR BUSINESS SUCCEED

# MARKETING PRODUCTS & SERVICES

## LEAD GENERATION Products & Services

- > Radio & Television
- > Referral Marketing
- > Dinner Seminars
- > Direct Mail Offerings
- > Client Appreciation Events
- > Email Marketing
- > Internet Leads
- > Print/Display Ads



## LIVE EVENTS & TRAINING Products & Services

- > Expert Video Training
- > Series 65 Training Class
- > Quarterly Live Educational
- > Training in Unique Locations



2023 Super Conference Empower Field,  
Home of the Broncos



2024 Super  
Conference  
Gaylord Texan,  
Dallas, Texas

## DIGITAL MARKETING Products & Services

- > Custom Website Design
- > Google Business Creation & Optimization
- > Social Media Branding
- > Social Media Ad Campaigns
- > Google Ads
- > Content Development
- > On-Demand Seminars
- > Podcasts & Advisor Blogs
- > E-Newsletters
- > Domain Registration & Hosting
- > Custom Email Addresses
- > Website Analysis & SEO
- > Advisor Webinars
- > YouTube Channel Design & Optimization
- > Email Signature Design



Social Media Ad Campaigns



Custom Email Signatures



Custom Website Design

## DIGITAL MARKETING Brand Protection

- > Google Business Profiles
- > LSEO & Brand Protection
- > Basic Search Optimization



## DIGITAL MARKETING Consultation Offerings

- > Digital Strategies
- > Online Presence & Brand Development
- > Social Media Marketing
- > Content & Resources
- > CRM Redtail Training
- > Website Management
- > Hosting Webinars
- > Blog & News Management
- > Client Segmentation
- > Trademarking Guidance for Your Brand
- > Marketing Automation
- > Boosting Your Online Reviews
- > How to Respond to Negative Online Reviews



Get More Online Reviews



## OFFICE NEEDS Products & Services

- > "Celebritying Your Brand"
- > Stationery (Letterhead, Business Cards, Envelopes)
- > Binder Covers
- > Custom Pens
- > Notecards/Notepads
- > Office Welcome Signs
- > Water Bottles
- > Kiplinger's Magazine



Custom Pens



Kiplinger's Magazine  
"As Seen In" Exposure



Custom Water  
Bottles

## BRAND CREATION Products & Services

- > Logo Design & Brand Identity
- > Company Website
- > Business Cards
- > Email Signature Design
- > Branding Guides
- > Brochure & Booklet Design
- > Packaging Design
- > Exhibition Materials
- > Promotional Items
- > Display Advertising: Buses, Billboards, Grocery Carts, etc.
- > Custom Marketing Plans
- > Social Media Banners, Bios & Profile Icons (LinkedIn, Facebook, Instagram, TikTok)



Custom  
Logo Design

## SEMINAR MARKETING Products & Services

- > Full-Service Seminar Planning: Locating a Venue & Finding a Mail-house
- > Seminar Mailers & Fulfillment
- > Professional Seminar Coach
- > Custom Welcome Folders
- > Appointment Reminder Cards
- > Welcome Letters
- > Advisor Bio Sheet
- > Appointment Booklets
- > Welcome/Bio Letters
- > Table Number Cards
- > Appointment Sheets
- > Fact Finder Sheets
- > Custom Brochures
- > Pull-Up Banners
- > Tablecloths

## CLIENT APPRECIATION Products & Services

- > From referral and seasonal events, to intimate client gatherings, we offer start-to-finish guidance helping you plan your next event.



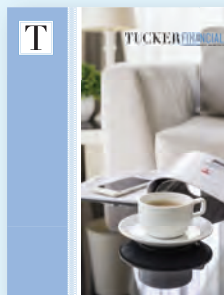
Holiday Pie  
Giveaway Event



Intimate  
Client Appreciation  
Golf Outing

\* Ask about our Client Appreciation Guide

### Billboard Advertising



Custom Catalogs



Pull-Up  
Banners



Custom  
Tablecloths

Professional Coach  
Brad Smith

\* Ask about our  
Seminar Guide



## CELEBRITIZE YOUR BRAND Products & Services

- > Pens
- > Water Bottles
- > Gift Bags & Gift Tags
- > Back Scratchers
- > Luggage Tags
- > Yeti Tumblers
- > Clothing & Apparel
- > Sleep Masks
- > Lip Balm
- > Mouse Pads
- > Golf Balls
- > Balloons
- > Customized Playing Cards
- > Puzzles & Stress Relievers
- > Ask Us About Many Other Products



Custom  
Balloons



Custom  
Yeti Mugs

Back  
Scratchers



Custom Gift Bags

## LEGACY GUARD Estate Planning Package

- > Financial Future Document
- > Customized Document Safes
- > Protected USB Storage



Legacy Guard  
Storage Box &  
USB Key

## CONTENT MARKETING Products & Services

- > Copy writing
- > Radio, Phone & TV Scripts
- > Custom Website Copy
- > Articles & Story Consultation
- > Leveraging & Utilizing AI
- > Blog Consultation
- > Book Coaching & Editing
- > Proofing Services
- > Letters to Prospects & Clients
- > Prospective Client E-mails
- > Existing Client E-mails
- > Advertising Content
- > Company Brochures
- > Sponsored Content



Radio, Phone & TV Scripts

## MARKETING GUIDES Products & Services

- > Administrative Assistant
- > Client Appreciation
- > Digital Marketing
- > Traditional Marketing
- > Seminars
- > Tucker Studios



\* Ask a Marketing  
Developer for Your Free Copy

## REWARDS PROGRAM Products & Services

- > Marketing Dividends
- > Referral Dividends
- > Rewards Trips



## BROADCAST MARKETING Products & Services

- > Showcase Videos
- > Showcase Essentials Package
- > Tucker Studio Production
- > Radio Ads
- > Podcasts
- > On-Demand Seminars
- > On-Demand Videos
- > Advisor Webinars
- > Video and Audio Production & Editing Services
- > Interactive Media
- > Photography: Studio & Location
- > Professional Headshots
- > Training Video Support
- > Retire Happy Hour "As Seen On TV" Television Spot



Tucker Studios



Showcase Video and Retire Happy Hour  
Production Opportunities

\* Ask about our Tucker Studios Guide

# OFFICE TRAINING & SUPPORT

## OFFICE OPERATIONS

### Consultation Offerings

- > Find & Hire Staff
- > Secure a Business Operations Loan from Your Local Bank
- > Create & Implement Processes
- > Find an Office Location
- > Purchase My Office
- > Administrative Training
- > Accounting
- > Human Resources
- > Errors & Omissions Insurance
- > Knowing What to Pay Staff
- > Staff Benefits
- > Health Insurance

\* Ask about our Administrative Assistant Manual



Office Consultation

## TUCKER

## ASSET MANAGEMENT

### Products & Services

- > Compliance
- > Marketing
- > Performance Reporting
- > Service Platform
- > Curated List of Investment Models
- > Turn-Key Transition Support
- > Quick-Response Support Team
- > Case Design
- > Proven Sales Process
- > How to Incorporate "Assets Under Management" into Your FIA and Life Sales



## SALES TRAINING

### Products & Services

- > How to Use Redtail CRM
- > How to Use SIPS
- > The Prospect Interview Process
- > Creating Income Plans
- > Closing the Sale
- > Tax-Free Income Using IUL
- > Annual Reviews

Proprietary SIPS Training

## LIFE INSURANCE

### Products & Services

- > Estate Protection
- > Income Planning
- > College Planning
- > Roth Conversion Alternatives
- > Tax Mitigation
- > Advanced Life University



Tucker Advanced Life Insurance

## SALES SUPPORT

### Products & Services

- > High-Profile Uses of Annuities
- > History of Annuities Timeline
- > Sales Materials
- > Retirement Income Plans
- > Latest Software & Rates
- > Firelight Applications
- > Annuity Rate Watch
- > Current MYGA Rates
- > Access to over 50 Carriers



Latest Software & Rates



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**At Tucker Advisors, we don't believe the one-size-fits-all model belongs anywhere in the financial industry. Not on the sales side and certainly not on the marketing side, either.**

**That's why we try to customize the marketing services listed in this brochure to each individual advisor's practice. This includes consultations with advisors about what is the best fit for their needs and, much like they tell their clients, why it's important to develop a plan.**

**Any esteemed field marketing organization should provide its advisors with a roster of marketing services designed to enhance their outreach and client engagement strategies. But that means nothing without taking into consideration the proper context of the advisor's marketing needs. We believe marketing support is just as important, if not more, as offering a comprehensive platform of modern marketing services.**

**We work with our advisors to ensure the marketing services here are employed the right way at the right time and context, so that they empower our financial advisors to build their brand, attract new clients, nurture existing relationships, grow their practices and stand out in our highly competitive industry.**



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