



FINANCIAL

Dinner Seminar and Virtual Event Marketing Guide & Calendar

If you're ready to grow your financial business, LeadingResponse is ready to help get you there. Now is the time to plan for the upcoming year and find solutions that turn high income prospects into quality clients for your business.

Q1



Attract new clients with our turnkey multichannel solutions. We've generated over 6.4 million appointments for our clients.

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January

Dates: New Year's Day 1/1, Dr. Martin Luther King, Jr., Day 1/17

Reach consumers anytime, anywhere. Take advantage of our Hybrid Solution – combining live seminars and webinars. This combo solution brings overall higher attendance rates and superior customer service as consumers can engage in the manner they prefer - whether it is at a local restaurant or in the comfort of their own home.

Hot Topic: Social Security & Retirement

S	M	T	W	TH	F	S
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February

Dates: Valentine's Day 2/14, Presidents' Day 2/21

Put your services directly into their hands. Connect with consumers where they are. 25. That's how many years LeadingResponse has been promoting and growing clients for our customers through direct mail. When experience matters, we've got your back.

Hot Topic: Social Security & Retirement

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March

Dates: Ash Wednesday 3/2, St. Patrick's Day 3/17

Meet prospective clients face-to-face. In-person meetings can solidify yourself as the right person for the job. Targeted ads with incentives put the right prospects on your calendar. Seamlessly. All you need to do is choose the appointment dates and times – we do the rest.

Hot Topic: Taxes & Social Security



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April

Dates: Passover 4/15-4/23, Easter 4/17,
Tax Day 4/15

Dinner seminars are proven successful. Face-to-face interaction. Building relationship. In-person events have been a proven marketing success for decades. Get in front of the right audience, at the right time, with the right message.

 **Hot Topic: Estate Planning & Retirement**

S	M	T	W	TH	F	S
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May

Dates: Mother's Day 5/8, Memorial Day 5/30

Let our experience work for you. We connect 1.7 million consumers each year. We merge technology and traditional marketing to streamline the customer acquisition process. RSVPs, customized event pages, flexible pricing, and event formats are success driven.

 **Hot Topic: Social Security & Retirement**

S	M	T	W	TH	F	S
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June

Dates: Father's Day 6/19

Wherever they are, we find them. As a Facebook Premier Partner and a Google Premier Partner, we are uniquely situated to reach more prospects looking for your services. From dinner seminars, to direct mailings, to webinars – our multichannel solutions put us where your future clients are.

 **Hot Topic: Wills & Trusts**

We connect 1.7 million consumers with our clients every year.

July

Dates: Independence Day, 7/4

Meet more prospects, in more ways. Schedule one-on-one appointments, get calls delivered to your phone, meet them in webinars and seminars. Our marketing experts do whatever it takes to get successful closure for you. And our metrics speak for themselves.

 **Hot Topic: Wills & Trusts**

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August

Get faster results, increased prospects, and improved ROI. We've cracked the code to generating high-quality, motivated prospects – consistently. Our marketing solutions are custom designed to put you in front of your ideal audience.

 **Hot Topic: Estate Planning & Retirement**

S	M	T	W	TH	F	S
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September

Dates: Labor Day 9/5, Rosh Hashanah 9/25-27

Never miss the chance to connect with a prospect. Track qualified visitors on your website, even if they don't leave contact information. Our VisitorConnect program retargets visitors that match your qualifying characteristics and send a targeted direct mail piece within 48-72 hours. Studies have shown that direct mail response rates are 5 to 9 times higher than any other channel.

 **Hot Topic: Social Security & Retirement**

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Our experience speaks for itself. LeadingResponse has procured over \$117 billion dollars in revenue for our clients through our solutions.

Q4



The year may be closing out, but now is the time to grow your business for tomorrow. Our multichannel solutions are uniquely designed to help you realize new levels of success.

No Events Good Event Dates Social Caution Caution Call Us
When reviewing dates, be aware of major sporting events

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October

Dates: Yom Kippur 10/4-10/5, Columbus Day & Indigenous People's Day 10/10, Halloween 10/31

Merge solutions and reach people where they are. Combine social ads, live seminars, webinars, and direct mail to reach your targeted audience every time. Hyper-targeting can put the right consumers in front of you, time and time again.

Hot Topic: Social Security & Charitable Giving

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November

Dates: All Saints Day 11/1, Veterans Day 11/11, Thanksgiving Day 11/24

People today want to choose how, where, and when to connect. At their desk. At home. On the move. Reach them with WebinarConnect. We make it easy. Just pick a date and a time and we handle the rest. Customizable landing pages, branded content, and our multichannel targeting puts the right prospects in front of you, at the right time, in the right place.

Hot Topic: Taxes & Social Security

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December

Dates: Hanukkah 12/18-12/26, Christmas Day 12/25 and 12/26 (observed), Kwanzaa 12/26-1/1, New Year's Day 12/31 and 12/30 (observed)

Now is the time to grow your business for tomorrow. Our solutions are uniquely designed to help you realize new levels of success. Reach a broader audience with LeadingResponse at your side.

Hot Topic: Taxes & Retirement

2022 New Client Acquisition Goal Worksheet

Now is the time to focus on moving forward and engaging with new consumers. Our marketing solutions are proven to help connect you with more prospects and grow your business. Let us help position you for long-term success.

Find out what success means for your business. Use this worksheet to calculate how many new clients your campaigns must generate to meet your 2022 production goals. When you're done, get in touch with your marketing consultant to discuss rollout of your plan and steps to make it happen.

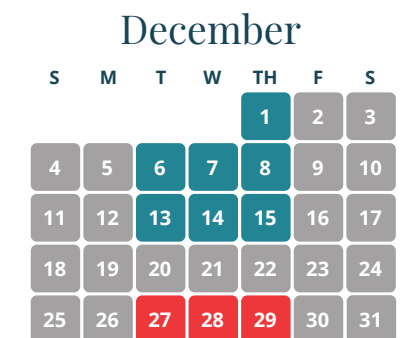
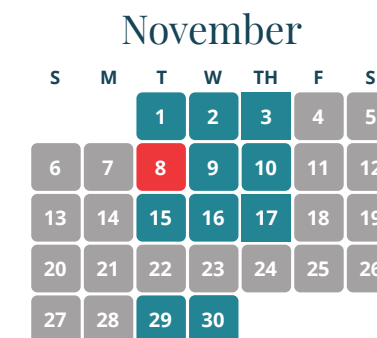
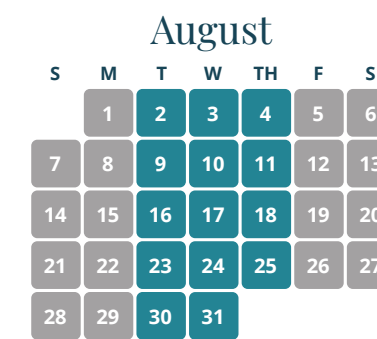
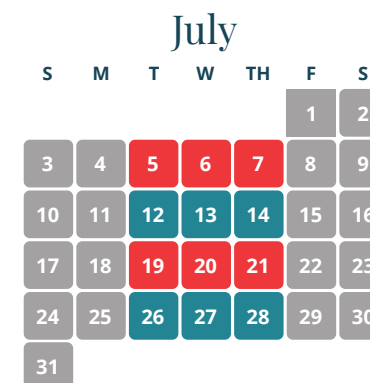
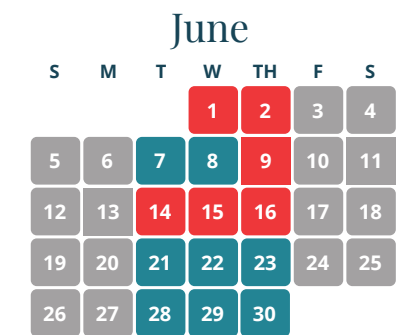
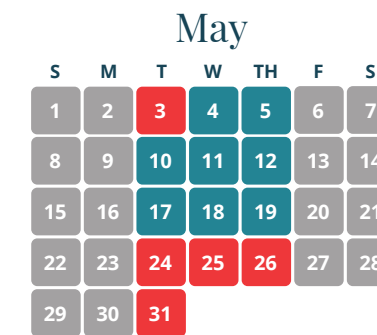
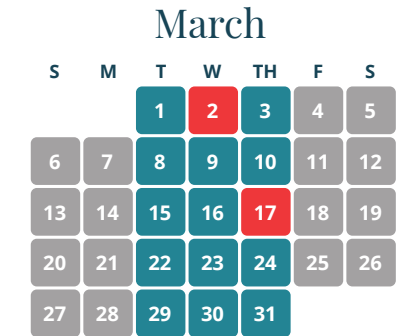
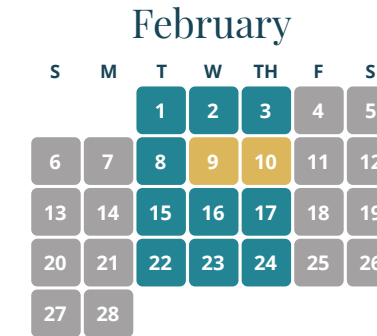
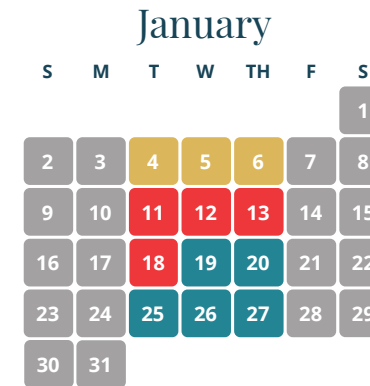
2022 Sales Goals (Line 1)		Average Sale (line 2)		Total Clients (Line 1 + Line 2)	
Product	Amount				
Life and Annuity Premium	\$ _____	÷	\$ _____	=	\$ _____
Investment Products AUM: (Traditional & Alternative)	\$ _____	÷	\$ _____	= +	\$ _____
TOTAL:	\$ _____				TOTAL CLIENTS NEEDED: \$ _____



Dinner Seminar and Virtual Event Calendar At-A-Glance

No Events
 Good Event Dates
 Social Caution
 Caution Call Us

When reviewing dates, be aware of major sporting events





Get Started Today.

Call us at (888) 907-3971

or visit us at

LeadingResponse.com/financial/



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