

# IF YOU GIVE A PROSPECT A PANCAKE



... HE MAY WANT  
A SEMINAR  
TO GO WITH IT.

## REMEMBER WHEN YOU WERE A LITTLE KID

in elementary school, and you thought your teacher lived at school and didn't have a life outside of teaching? And if you ever ran into your teacher in public, maybe at the grocery store, you would think, "What are you doing here?!"

If you never meet with clients and prospects outside of your office, they may think the same thing about you.

It's important to appear integrated into the community you share with your clients. It not only helps you seem more genuine, personable and approachable, it also helps you stand out from your competition.

Take a client to the golf course. Hold a referral picnic in the park. Or ... host a brunch seminar at a pancake house?

In the words of AE producer Jim Hanna, "Do what the other 95 percent aren't doing, and don't be afraid to try new things!"

Jim lives and works in San Antonio, Texas, home of the Magnolia Pancake Haus. It's an upscale pancake restaurant, a favorite with the locals known for "serving San Antonio's best breakfast," and any given day the wait time is often more than two hours.

At first glance, the pancake house may not have seemed an ideal space for Jim to host a financial seminar and insurance sales presentation for prospective clients — but that's exactly why he did it.

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## JIM HANNA'S PANCAKE MIXER RECIPE

For two dates in March, Jim rented out one of Magnolia Pancake Haus' Wi-Fi-enabled conference rooms and held a seminar for prospective clients.

### Here's how he did it:

- Mailed 5,000 invitations that included a flyer describing the seminar
- Advertised to hold the seminar on two dates
- Received a combined 140 RSVPs for the two days
- Allowed 40 RSVPs per seminar due to room capacity; 60 people were put on the wait list
- Paid a combined total of \$5,602.12 for the mailer and both days of meals

Is there a favorite restaurant or venue in your community that only the locals know and love?

**CONTACT YOUR VP OF MARKETING  
AT 866.363.9595 TODAY**

for more ideas on how you can make your next seminar one to remember — and one clients and prospects are eager to attend.

The results: 57 people attended, and Jim has already written \$650K in annuity premium with the prospects who became clients — with much more likely on the way from prospects awaiting their scheduled second appointments.

*Please note that any event invitation where your practice or firm may be promoted must clearly indicate that you assist consumers in the creation of retirement strategies utilizing insurance and, if appropriately registered, investment products.*

*Federal law, state law and/or insurance carrier requirements may prohibit or place limitations on marketing activities. State guidelines addressing prohibited inducements and rebates in the sale of insurance may still allow for gifts and/or marketing items up to specified dollar limits, which in some states includes the cost of meals. Please be sure to check the rules and regulations of the states in which you are licensed to conduct business, as well as any applicable federal regulations and any applicable broker-dealer or Registered Investment Advisor gifting limitations.*

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