

INTRODUCING SOCIAL SECURITY PLUS





Almost every American will be eligible to receive Social Security benefits, yet almost no one creates a comprehensive retirement plan. Don't stay on the tip of the iceberg of retirement planning. Get under the surface with SS+ and its five components:

1. Leads

Offering Social Security guidance is a great way to grow your database. Some advisors enjoy holding workshops/seminars while others prefer individual consultations with clients. Whichever you prefer, Ideal has a program that will help you. Average response rates from direct mail campaigns are in excess of 1%. Average monthly leads from online landing pages are around 25!

2. Presentation

Your clients want to learn more about Social Security planning. Demonstrate your expertise with Ideal's proprietary and customizable client presentation that finds the right balance of Social Security details while not being overwhelming.

3. Maximizer

After learning about Social Security, your clients are ready to take the next step: learn about their unique Social Security benefits. At the client's Social Security review, deliver a report that shows how the client can maximize Social Security. This report will analyze hundreds of Social Security filing strategies, but it's only the tip of the iceberg.

4. Estimator

It's time to get below the surface of retirement income planning! The SS filing strategy that maximizes benefits may not work well with the client's retirement goals. Ideal's proprietary SS+ Estimator program determines how to achieve retirement goals with the least amount of assets.

5. IRIS

The final step is to provide an Integrated Retirement Income Strategy that will show the client exactly how to achieve his or her retirement goals. This proprietary and customizable plan is sure to wow your clients and lead to increased sales.

Social Security Plus

Comprehensive Retirement Income Clarified



Welcome to Social Security Plus! Social Security benefits are critical to every retiree's income plan, but unfortunately, government benefits are rarely enough. Retirees need more. They need more education, better integration of their income sources, and simply more income. Social Security Plus is the answer: a comprehensive sales program that begins with high response rate lead generation and ends with professional sales illustrations customized to each client.

SS+ is far more than a seminar, it provides interactive tools and expert presentation content that will impress. Our Maximizer tool, with state of the art graphics and simple interface, illuminates the mechanics behind Social Security benefit calculations. But the heart of the program is our retirement income Estimator. Unlike any other financial tool, Estimator will clearly demonstrate exactly why the income annuities you sell are the key to achieving a cohesive and safe retirement income plan. And when you are ready to close the sale, Ideal will prepare a customized, Integrated Retirement Income Solution that will have them asking, "where do I sign?"

At Ideal, we are always looking to replace hype with clarity and substance. The elements of SS+ are simple enough to grasp quickly but powerful enough to meet the demands of your most analytical clients. Most importantly, Social Security Plus comes with the high quality support and expert guidance you've come to expect from Ideal.





Landing Page & Drip Email Options



5.5x8.5" Invitation



8.5x11" Wedding Style Invitation



8.5x11" Wedding Style Invitation

LEADS

Grow your database with SS+ Leads! We are pleased to offer four customizable options:

1. Internet Leads

Our most affordable option. This approach offers an indirect way to generate exclusive and qualified leads. Includes video, script, and fact finder. Average response rate: 20-30 leads per month.

2. Appointments

If you're interested in leads for qualified clients but don't want to offer a seminar, then this option is for you! You will receive a personalized RSVP service, an online database where you can monitor results and quick turnaround. Average response rate: 10-15 appointments per campaign.

3. Workshops

This option is great whether you are experienced at offering workshops or if they are new to you. Workshops work well at a local library, community center or school and typically don't include food. Average response rate: 65-80 reservations per campaign.

4. Dinner Seminars

Our most robust program is a traditional dinner seminar. This program is for the experienced seminar speakers. Includes a personalized RSVP service, web landing page and strong focus on customer service. Average response rate: 37-50 reservations per campaign.



PRESENTATION

Seats have been filled and appointments have been set with SS+ Leads! It is now time to explore the tip of the iceberg with SS+ Presentation. This proprietary client presentation will educate your client on Social Security while also showing the need for guidance when creating a retirement income plan. Contact your IPG advisor to get the presentation personally customized to you and your needs.

The Presentation packet that will be emailed to you includes:

- Client Presentation (PowerPoint format)
- Script

Additional materials:

- SS+ Quiz
- SS+ Quiz Answer Key
- SS+ Fact Finder
- SS+ Guide to Fact Finder





MAXIMIZER

Your clients have learned about Social Security and have signed up for individual appointments. It's now time to show them how to maximize their Social Security benefits by analyzing all the filing strategies available to them. Don't let them leave money on the table! While numerous Social Security software programs are available, we have chosen to endorse Social Security Explorer.

Social Security Explorer is:

- 1. Easy and intuitive to use
- 2. Dynamic and visually appealing
- 3. Comprehensive
- 4. Affordable

After determining how to maximize Social Security, it's now time to get below the surface of the iceberg and create a comprehensive retirement income plan.





ESTIMATOR

Many Social Security programs offer leads and seminar materials, but few help you transition Social Security advice to a sale. SS+ gets below the surface with SS+ Estimator. This IPG designed, web-based tool will set you apart from your competition. Bring this calculator to your clients! Make adjustments right in front of them and decide the best strategy. SS+ Estimator will determine if the client's retirement goals are realistic and how to achieve them.

It will answer the questions:

- How can retirement goals be met with the least amount of assets?
- How much does it cost to use the SS max filing strategy?
- How many assets are needed if SS is started earlier? Later?
- How does the plan change if the client and/or spouse decides to work longer?
- When can the client retire based on available assets?
- What amount of retirement income can be expected based on a certain retirement date?





IRIS

After gaining a general understanding of how best to meet the client's retirement goals with Estimator, it's now time to wow your clients with an Integrated Retirement Income Strategy (IRIS). This proprietary software program combines SS benefits with other income solutions to meet the client's retirement goals. It will show your clients exactly what needs to be done in order to have their dream retirement.

IRIS demonstrates:

- The retirement income shortage left by SS benefits only
- How the income shortage can be removed
- Cost of various income strategies
- Ramifications when one spouse passes away



ADDITIONAL COMPONENTS

In addition to the five base components to the SS+ program, Ideal Producers Group is also excited to offer all of the supplemental materials you should need. At IPG, we strive to be your complete back office support team- let us know if there is anything you think would be helpful to have with this program.

Additional materials:

- Guide to Social Security Book
- Sample Mailers & Letters
- Presentation Script
- SS+ Quiz
- SS+ Quiz Answer Key
- SS+ Fact Finder
- SS+ Guide to Fact Finder
- Educational Webinar Recordings for each SS+ Component
- Comprehensive Overview Webinar Recording
- Detailed Instructions & Screenshots for each calculator
- Numerous Sample Cases
- Dedicated IPG Support Team
- IRIS Software Run by IPG's In-house Actuarial Team

WHY CHOOSE IDEAL AS YOUR GUIDE?

ideal test

THE IDEAL ADVANTAGE

What makes Ideal your perfect business partner?

1. We Answer the Phone

In a world of automation and declining customer service, we understand time is valuable. Waiting on the phone could cost you a sale. Call us and we'll answer, immediately.

2. We Get Your Business Issued

We make sure your business is submitted as cleanly as possible. We'll scrub, track and follow up all applications. Your business will be issued accurately and on time.

3. In-house Actuaries

Our Actuarial Team has developed dozens of annuity and insurance products. Call us to get the straight scoop on everything from new products to market conditions.

4. Experienced Annuity & Life Advisors

With decades of experience, our Advisors help you understand the market and strive to give you the competitive advantage. We position our members for success.

5. We Make You EFFECTIVE.

IPG has a wealth of sales and educational tools. Grow your business with our proprietary SS+, Lifetime Income Comparisons, Ideal Office, monthly educational Forums, generous cash incentives or our fabulous trips.



Ideal Producers Group

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