

# Client Creation Newsletter Program

## Newsletter Set up

There are three parts to this document. Below are general instructions and tips for the initial set up of your newsletter. The second part, to help you get started, shows examples of elements for your publication. The final page is a fill-in-the-blank form which I use for setting up a consistent look for you newsletter.

### HEADER/FOOTER

- Please read the report *Name Your Newsletter for Success* first. It gives you valuable tips. Send me your best ideas and I'll contribute my own as well. Together we'll come up with something great!
- Please email me a photo of you in jpeg format. Your photo should be a close-in head shot with an uncluttered background (like a white wall.) If you have a professional head shot send it. But that is *not* needed. A decent snap shot on a camera phone in front of a plain background would probably work fine.
- If you would like the header/footer font to be similar to your business card, please tell me the font name. If you don't know it, send me the card I will do my best to find something similar.

### REFERRAL BONUS

- Refer to the "**Example Newsletter Elements**" on the following pages. Make your selection by number or write your own. You may mix and match phrases and change the reward, for example, "*# 4 but auto and homeowners' insurance*".
- Please check with your **state's gifting limits** to verify what you are allowed to give and any rules. For example, some states do not allow you to restrict the gift to when someone buys.

### END CREDITS

- Refer to the "**Example Newsletter Elements**" on the following pages. Make your selection by number or write your own. You may mix and match phrases, for example, "*#10 but change title to \_\_\_\_\_ and omit license number*".

### GENERAL

- If there is any information you do **NOT** want to appear on your newsletter, please write "**omit**" on that line instead of leaving it blank. That tells me you did not accidentally skip it on the form.
- If you get stuck or are having difficulty, complete as much of the form as possible then check the box "I need help with this section" and send it back to me. We'll work on it together by phone and email.
- Send me as many alternate choices as you'd like. I'll use my experience and expertise to synthesize the best possible set up for your publication.

Keep in mind you will have a multiple opportunities to tweak your newsletter template prior to final approval. I won't stop working till you are thrilled with the results. This is all about YOU!

Questions or concerns? You can reach Victoria Eden at (770) 974-6660.  
Return the data sheet by fax to (770) 200-1611 or email the information to  
Victoria@MoreClientsEasier.com

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Updated October 2016

# Example Newsletter Elements

## Referral Bonuses

You may use any of the following as-is, alter them or mix and match phrases to find the ideal combination.

①

### New Clients Accepted!

The finest compliment I can receive is a referral from a satisfied client like you. Thank you for the trust you have placed in me with your **financial** needs. Please send your friends and family to me knowing that I will care for them as I have cared for you!

(Use #1 if you cannot or don't want to offer a reward for referrals.)

②

### Referral Bonus Paid!

I'll send you two tickets to the movies when you refer a friend, neighbor or family member who becomes a client. Do you know someone who needs **home, auto or life insurance or financial planning**? Send them my way and I'll treat you to an evening at the movies!

③

### Referral Reward Paid!

When you send your family and friends to us for FREE insurance or financial advice, you'll receive a **\$10** gift card to **[grocery store]** or **[restaurant]** AND a **\$10** donation will be made on your behalf to **[local charity]**. Unlimited rewards paid so spread the good news about our service!

④

### Earn a **\$20** Referral Bonus!

Imagine being rewarded for helping friends and family! That's what happens when you refer others for help with **life or health insurance**. Send them to me for honest advice and no pressure. When they become my client, I'll send you a check for **\$20** to spend however you want!

⑤

### FREE Movie Tickets!

I'll send you two tickets to the movies when you refer a friend, neighbor or family member who becomes a client. Do you know someone who needs **investment advice, Medicare supplement insurance, retirement planning or long term care planning**? Send them my way and get a night at the movies on me.

⑥

### Win a FREE Big Screen TV!

We want more clients just like you! Send us your family and friends for **insurance or financial planning**. Every referral earns you one ticket in our quarterly drawing for an **[iPad.]** There is no limit on how many times you can enter so tell others what you like about our service.

⑦

### You're a **\$50** Prize Winner?

You could be a winner in our monthly drawing for a **\$50** gift card to any store or restaurant! How? Tell your family, friends, neighbors and coworkers about our great service. When they call for a quote, your name will be added to the fishbowl for a monthly drawing. Refer as many times as you like. There is no limit to how many times you can enter.

Congrats! Last month's winner was **[name here]**!

⑧

### Referral Bonus Paid!

Thanks for being my loyal client! I want more people just like you. I will reward you with a night on the town when you refer family, friends or coworkers who become my client. Send them to me for **insurance advice** and I'll send you a gift card for two movie tickets and \$25 for dinner. Spread the good news and be rewarded with their thanks AND ours!

# Example End Credits for Special Reports

You may use any of the following as-is, alter or mix and match phrases to find the ideal combination.

1

**Agent Name** helps seniors prudently manage their retirement savings and insurance protection to create their ideal lifestyle. He can be reached at (555) 555-5555.

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2

**Agent Name** helps families protect their lives and property with correct insurance coverage.

He can be reached at (555) 555-5555.

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3

**Agent Name** helps seniors easily navigate the Medicare maze and manage their retirement funds. He can be reached at (555) 555-5555 or through his website

www.websiteaddresshere.com

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4

**Agent Name** is a financial planner specializing in the needs of seniors. He can be reached at (555) 555-5555 or via email at youremailaddress@servername.com

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5

**Agent Name** helps seniors choose the best Medicare plan for their needs and budget. He can be reached at (555)

555-5555 or via his website your

www.websiteaddresshere.com

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6

**Agent Name** is your source for business insurance protection and pension planning. He can be reached at

(555) 555-5555

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7

**Agent Name** delivers peace of mind through more informed decisions about insurance, investments and all aspects of financial planning. You may reach him at (555)

555-5555 or by email at

youremailaddress@servername.com

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8

**Agent Name** is an honest broker who represents clients to find the best value for their insurance dollar. You may reach him at (555) 555-5555 or via his website

www.websiteaddresshere.com

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9

**Agent Name** helps seniors with money, health and insurance needs. You may reach him at (555) 555-5555 or youremailaddress@servername.com

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10

**Agent Name** is an Investment Coach providing prudent planning for peace of mind. He can be reached at (555) 555-5555. State License #1234567.

Registered Investment Advisor.

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**Agent Name** provides FREE expert advice on financial planning and insurance protection. He can be reached at (555) 555-5555 or via his website,

www.websiteaddresshere.com

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# CLIENT NEWSLETTER INITIAL SET UP DATA SHEET

<b>CUSTOM NEWSLETTER HEADER (PAGE 1)</b>		<input type="checkbox"/> I need help with this section.	
Newsletter name:			
Tag Line:			
Lines/products:		Target market:	
<b>Photo:</b> <input type="checkbox"/> I will email photo <input type="checkbox"/> I will mail a photo to be scanned <input type="checkbox"/> I will omit the photo for now			
<b>LINKS &amp; LINES (PAGE 3)</b>		<input type="checkbox"/> I need help with this section.	
Your name:		Your agency name	
Street address:			
City:		State:	Zip:
Web address:		Email address:	
Office phone:	Fax:	Other:	
Office hours:			
<input type="checkbox"/> I want a map to my office.		<input type="checkbox"/> I want my logo inserted in this section.	
<b>REFERRAL PANEL (PAGE 4)</b>		<input type="checkbox"/> I need help with this section.	
Referral bonus example #	Modifications:		
Summary of your services for left side:			
<b>END CREDITS (ON REPORTS)</b>		<input type="checkbox"/> I need help with this section.	
Use example #	Modifications:		

**Questions or concerns? Call Victoria Eden (770) 974-6660**  
**Return this by fax to (770) 200-1611 or email to Victoria@MoreClientsEasier.com.**

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Updated December 2016