

Selling Strategies

6 Month Count Down to Age 65 Campaign

There are millions of people turning 65 every year that need help transitioning into Medicare and securing the insurance they will need during their retirement years. You can select from our consumer database prospects turning age 65 using their exact birthdate Month, Day and Year. Then send them a drip campaign each month leading up to their birthdate.

Follow These Steps to Build the Countdown to Retirement Campaign

1. Go to Prospecting Send Campaign page and on the Build List step click on Agree and Continue then open the Consumer Database
2. On Steps 1 and 2 select location criteria including State and Zip Codes or Zip Code Radius. Focus on local prospects in your community.
3. In Step 3 select a birthdate range using the Month Day And Year of the oldest birthdate and the youngest birthdate. Use as a starting point the 1st day of the next month. So for example let's say its July 1st and you are building a list of prospects turning age 65 in December. You would use the Oldest birthdate as December 1 and the youngest birthday as December 31st.
4. After clicking Search you will see the All Available list count for the criteria you selected. Also check the list count for the Previously Delivered, Opened and Clicked as this gives you the best opportunity for getting your messaged delivered and looked at. You can then save your list by clicking on the Build List button then save the list. Note that all lists will be cleaned before you can use them.
5. Go to Prospecting Send Campaign and skip the first step and go to Select List. Select the new list you built.
6. Click Next to go to Build Email Step then select the Selling Strategies Template Gallery Tab in the middle of the page
7. Select the **Count Down to Retirement** multi-part campaign (6 part message – see below)

Primary Message and Follow Up 1 and 2

Sent 6, 5 and 4 Months Before Age 65

Subject: Countdown to Retirement, (Recipient First Name) Are you Ready?



Countdown to Retirement

Preparing For Retirement

Retirement can be both an exciting and scary time in your life. The key to a successful retirement is understanding your options and building a plan for your specific needs.

As a retirement insurance specialist I work with many people in our community to help them understand and prepare for retirement. Here are a few important resources to help you prepare.

<https://www.ssa.gov/planners/retire/prepare.html>

<https://www.medicare.gov/>

Let's schedule a call to discuss your questions and insurance options like Medicare Supplements, Long Term Care Insurance and Senior Life Insurance.

Contact Information Here

Follow Up 3 Message – Send 3 Months Before Age 65

Subject: Countdown to Retirement – Understanding Medicare Supplement Options



Countdown to Retirement

Understanding Medicare Supplement Programs is a key part of building a secure retirement. With all of the different plans available it can be confusing and time consuming to find the right solution.

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Medigap & Medicare Advantage Plans

<https://www.medicare.gov/supplement-other-insurance/medigap/medigap-and-medicare-advantage/medigap-and-medicare-advantage-plans.html>

<https://www.medicare.gov/Pubs/pdf/02110-Medicare-Medigap.guide.pdf>

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Contact Information Here

Follow Up 4 Message – Send 2 Months Before Age 65

Subject: Countdown to Retirement – Understanding Your Long Term Care Options



Countdown to Retirement

Understanding Long Term Care

Research suggests that most Americans turning age 65 will need long-term care at some point in their lives. With some forms of Long Term Care exceeding \$7,000 a month, your retirement saving is at risk if you're not prepared. Here are some annual cost examples for different kinds of Long Term Care.

Median Annual Cost of Long-Term Care

Adult Day Care	\$17,680
Assisted Living	\$43,539
Homemaker Services	\$45,760
In-Home Health Aide	\$46,332
Nursing Home (semi-private room)	\$82,125
Nursing Home (private room)	\$92,378

Source: Genworth 2016 Cost of Care Study

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<https://longtermcare.acl.gov/the-basics/>

Let's schedule a call to discuss your questions and insurance options like Medicare Supplements, Long Term Care Insurance and Senior Life Insurance.

Contact Information Here

Follow Up 5 Message – Send 1 Month Before Age 65

Subject: Countdown to Retirement – Understanding Your Senior Life Options



Countdown to Retirement

Understanding Senior Life Insurance

These days, seniors are living longer and staying productive longer. This means that many older people find that they have not outlived their need for life insurance. Many of today's senior citizens used to have coverage, but it may have lapsed because a term policy expired or was associated with a job that they retired from. The good news is that many top insurance companies offer life insurance for seniors, and most older people have some good choices like;

- **Term Insurance for Seniors**
- **Simplified vs. Guaranteed Life Insurance for Seniors**
- **Final Expense Life Insurance**

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Contact Information Here