

Maximize Your Value, Optimize Clients' Social Security Benefits



HELP CLIENTS MAXIMIZE SOCIAL SECURITY BENEFITS

Social Security benefits represent 30–40% of total retirement income for most Americans. But the majority take benefits at the earliest age possible, costing them \$100,000+ in lost lifetime benefits. Savvy Social Security Planning gives you the **expertise to educate clients on optimizing their Social Security strategy.**

Key Program Features

- ✓ Top-ranked Social Security claiming software rated by advisors
- ✓ 7 FINRA-reviewed client presentations
- ✓ 2 comprehensive study guides to build expertise
- ✓ Marketing toolkit with email drips, social media posts, more
- ✓ Q&A Forum to get answers from the experts
- ✓ 30+ client articles and handouts
- ✓ Newsletter, audit tool, and 12 CFP CE credits exam

Key Program Benefits

- ✓ Develop rock-solid mastery of Social Security planning through step-by-step guide, real-world Q&A database, and ongoing support from the nation's #1 claiming expert.
- ✓ Demonstrate Social Security expertise with top-ranked advisor software and custom client reports.
- ✓ Teach clients and prospects with 7 field-tested, Finra-reviewed presentations
- ✓ Build lifelong client loyalty by ensuring they maximize this critical retirement income source.
- ✓ Add \$5 million to \$25 million in new assets presenting Social Security workshops



ABLE TO MAKE A DIFFERENCE

"I have helped several widows who have lost their husbands at a relatively young age and had either forgotten or simply did not know they could be eligible for the spousal benefits. This has occurred multiple times. It is disheartening to realize how many struggling beneficiaries are unaware of their options. In this case, thanks to the program, I was able to make a difference."

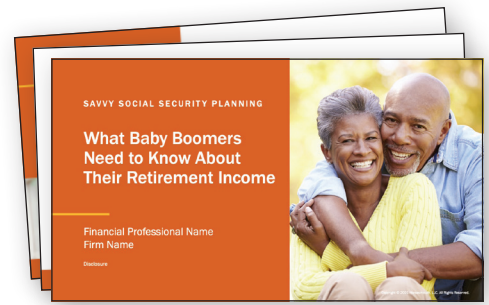
— Philip Rongo, Lebanon, NJ

Program Details: Comprehensive Expertise-Building Resources

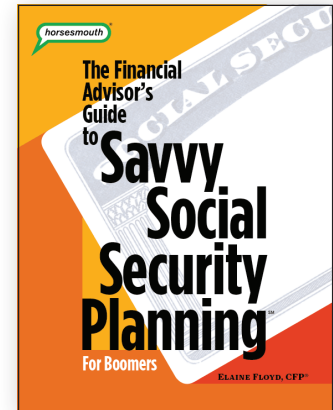
- ✓ 175+ page Social Security Planning Study Guide
- ✓ Q&A Guide with answers to over 135 frequent client questions
- ✓ Monthly newsletter provides latest insider tips and advice
- ✓ Complete Client Education & Marketing Toolkit
- ✓ 7 FINRA-reviewed presentations with customizable slide decks
- ✓ Marketing templates for seminars, webinars, drip campaigns
- ✓ Audit tool, client handouts, 30+ reprint articles

Top-ranked software produces custom client reports

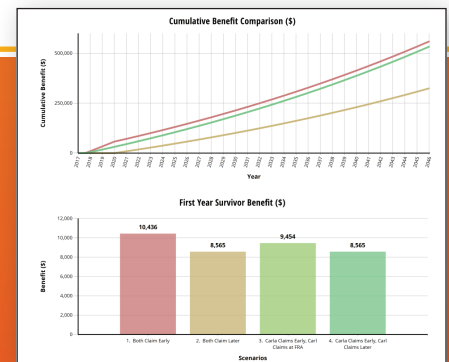
- ✓ Simple 3-step process to run scenarios and see strategies
- ✓ Detailed 17-page client report with claiming analysis
- ✓ Plus, complete control for custom client scenarios



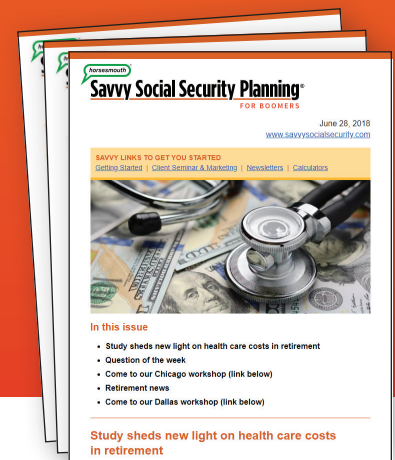
Finra-reviewed PowerPoint presentations



Advisor study guide



Claiming software



Bimonthly newsletter

Next Steps, Getting Started

1

Join Savvy Social Security today and save \$100 off the \$697 rate. For details contact Member Support at 1-888-336-6884, ext. 1

2

To learn more about this offer visit: www.horsemouth.com/demosocial

3

Savvy Social Security Member-Only benefit: Register for our workshops at the lowest rate, a \$597 value compared to non-members.

FOR INSTANT SERVICE

Call toll free: (888) 336-6884, ext. 1 (Outside U.S.: 1-212-343-8760)