

# Tax Diversification and Retirement

What You Need to Know

## No-Cost, Lead Generating Platform

### Utilize existing contact lists to create new opportunities

Take advantage of the Tax Diversification and Retirement program and have best-selling author, Patrick Kelly, provide the key insights that reduce future tax burdens and protect retirement income on your behalf. Simplicity agents can directly market this program to prospective clients and generate new business.

### Simplicity provides agents:



#### Email Templates

Copy, paste and send to your prospective clients



#### Patrick Kelly's *Tax-Free Retirement*

Discounted copies to send to attendees



#### Lead Generating Collateral

Social media posts and captions



#### Activity Reports

Summarized registration and attendee data



#### Call Scripts

Build relationships heading into the first appointment



#### Diagnostic Worksheet

Inform prospects of the information that will be discussed

