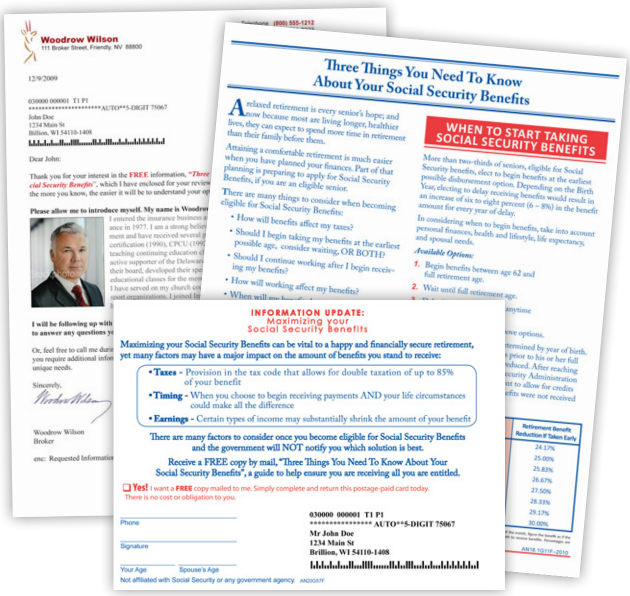
Drip Mail Campaign System
(DMCS)

At First Annuity & Insurance Marketing, Inc., we make it a priority to provide authentic, viable business solutions for the agents we work with. At the very core of that lies prospecting; providing producers with outlets to build and grow their business.

Introducing our drip mail campaign system (DMCS). If you've experienced direct mail before, get ready for direct mail on steroids! The underlying theme of the program is not just to get people to respond to a mailer, but to build credibility in the process, so when you sit down with that prospect for the first time, you have a distinctive advantage. They know why you're there, they know who you are and that they know you are a professional.

This is a turn-key, 3-point drip process and we do everything for you! We start by sending out our exclusive lead piece to the zip codes of your choosing. Right from the start is where our mailers differ. Unlike typical direct response card marketing, we don't ask for a phone number. Our intent is to send information and that's what we do, so clients let their guard down and, thus, response increases.



Respondents to the mailer then receive a follow up, carefully crafted, custom letter with your picture, signature, bio and an actual 1st class stamp. Also included is the informational pamphlet initially requested from the first mailer along with an actual copy of their request to refresh their memory.

Experts say it takes 7 touches to get the sale.

With our exclusive drip-mail campaign your first appointment with a prospect will be the 4th touch! Now that's a clear sales advantage!

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Schedule | DMCS

Advisors should begin receiving leads about three weeks after their initial order is mailed. Image files (PDF) of the leads will be uploaded to MyLeads as they are received; you will receive an email notification any time a file is uploaded to MyLeads.

All leads received during the same week (Monday through Friday) will be processed as a group. Letters will be mailed to each responder, within that week's group, the following Tuesday. For example, for each lead card received between Monday, the 12th to Friday the 16th, a letter will be mailed to the prospect on Tuesday the 20th.

If you have purchased telephone numbers with your original lead order, a "responder file" formatted as an Excel Spreadsheet will be uploaded to MyLeads that will correspond with each Tuesday's letter drop. If you have purchased the option to have copies of letters uploaded to MyLeads, as sent to responders, this will also occur at this time. These files are generally uploaded between Monday and Wednesday, the week of the mailing.

Advisors may log in to the MyLeads site anytime. We do advise saving the lead image and responder files to your computer systems rather than relying on MyLeads as digital storage. Basic instructions are available for MyLeads.

Please allow prospects time to receive your Letter of Introduction and Optional Informational Brochure. We suggest waiting until the following Monday to begin your calling campaign. In this example, advisors could begin making calls on Monday, July 26th. This process will be continuously repeated.

In order for the program to function properly, it is important advisors try to follow this schedule. Once you become comfortable and understand the timing of letters for your campaign, feel free to adjust your calling and visiting schedules as necessary.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9	10
11	12	13 ←	14 Leads Received	15	16 →	17
18	19	20 Letters Mailed	21	22	23	24
25	26 ☆ CALL	27	28	29	30	31

Example of a basic receiving, mailing, and calling/visiting schedule.

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Agent Info | DMCS

Must be accurately completed and in its entirety to process your order. Please read all instructions first. Any field that is not applicable on the agent section mark with N/A. All information collected on this form will be accessible to prospects responding to your lead program. Do NOT include any personal information you do not want to reveal to prospects.

Agent Information

First Name: ______________________________

Last Name: ______________________________

Title (Required): ______________________________

Business Name: ______________________________

____

Business Street Address: ______________________________

____

Business City: ______________________________

State: ________________ Zip: ________________

Business Telephone: ______________________________

Business Cell: ______________________________

Business Facsimile: ______________________________

Business Email: ______________________________

Web Site URL: ______________________________

Office Hours: ______________________________

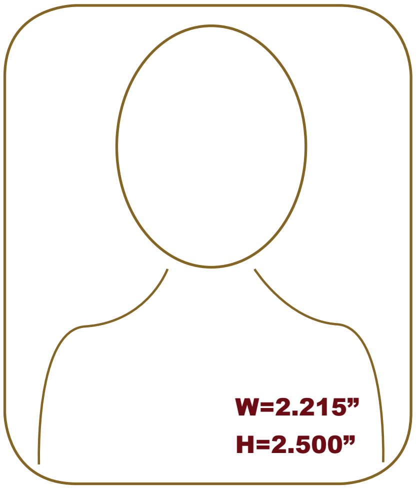
Licensing Designations: ______________________________

Agent Signature

Use a blue medium ball point ink pen to sign in the box provided below. Be sure your signature remains contained within the box and does NOT touch any of the lines of the box.

Agent Photograph

Please use double-stick tape or a glue stick to attach a color photograph.



Samples

Returning your order form to First Annuity:

Do NOT return this completed form via fax

Page 1: Type in information in each field then print. Sign and attach photo as instructed. Scan Page 1, in full color, 300+dpi. Page 2: Follow instructions for Biography. Copy content from your Word Document and paste into field on PDF file, Page 2. Save file.

Email Page 1 Scan and Bio (Word Doc or PDF) to Nicole@firstannuity.net or Mail Entire Completed Package to:

First Annuity ATTN: Nicole Skattum
7105 W. 44th Ave
Wheat Ridge, CO 80033

If you have any questions, contact your marketer at 888-758-7305.

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Agent Info - Biography | DMCS

Your biography is a chance for you to connect with prospects in a professional, yet personal way. While your qualifications are very important, as well as your accomplishments in the industry, so are your personal accomplishments and extra-curricular hobbies. Find a way to connect to your prospect on a personal level!

Your biography should contain more than 790 characters but absolutely no more than 810. We HIGHLY recommend that you create your biography using word-editing software, which generally auto-corrects spelling and grammar.

Find a character counter at www.webworldindex.com/countcharacters.htm

Lead-in Topics: educational background; length in the industry; length serving in the local areas

Middle Topics: Associations, such as BBB or National Ethics Bureau; reasons for joining the industry, if you found a connection to seniors, or maybe through helping parents found a need to help others.

Wrap-up Topics: Talk about your family, seniors especially connect with others through children; volunteerism in your community or church; clubs you enjoy and even extra-curricular activities or hobbies.

Additional resources for writing a biography can be found on the web at:

http://howtowritebio.com/?glicd=CNOVnK_Us6ACFdpe2goddi1JSw

http://ezinearticles.com/?Top-Ten-Tips-for-Writing-a-Professional-Overview-or-Biography&id=4628

http://www.ehow.com/how_2150465_company-website-online-social-network.html

Agent Biography

If you are completing the PDF version of this order form: Copy your biography text from the word-editing program and paste into the agent biography field in this box.

Example Biographies that meet the 790-810 Character allotment.

Example 1

After 25 years of serving the Austin, Texas area, my wife and I thought it was time to return to our hometown of Mulvane to take care of my mother, as well as her parents. While we do miss both our son and daughter, we feel as if we have “come home”. The passing of my father was a difficult time for my mother; I don’t know what she would have done without the help of her five songs. Since the loss of my father in 1990, Buddy Wright of KDKI radio, and realizing how much help my mother needed - helping seniors soon became my passion. We formed Whole Retirement Group in 2008 and have been serving our fellow Kansans since. I also enjoy going to classic car shows to display my 1955 Chevy hardtop. Being in the Mulvane Marauders Car Club has made my transition from Texas to Kansas much easier.

Example 2

I received my Bachelor’s Degree in Financing from St. Louis University in 1993 and immediately began working for Morgan Stanley Dean Witter in Winterborne, Missouri for the next three years. I have been an Advisor, Registered Representative for ten years and now work with my father (with 27 years of estate planner experience, himself). I thoroughly enjoy the family environment at work, as my mother is our Secretary! Our average client is 72 years young and we’ve been able to successfully help families time and time again, in the St. Charles and surrounding areas. I hold licenses Series 7, 65, 31, and Insurance, am a member of the local BBB and the National Ethics Bureau. My lovely wife and stay-at-home mom, Tera, our two children and I live in the community of Lake St. Louis, Missouri.

Helpful Tips | DMCS

The Drip Mail Campaign System is designed to build rapport with prospects and our results have shown it simply yields a better appointment. There seems to be a paradigm shift that breaks down barriers when prospects receive your follow up letter with your picture and bio. Remember the 7 touch rule and when you sit down with a potential client for the first time it's actually your 4th touch.

Once respondents have received your follow up letter, it is crucial to the success of the program to proceed in a manner that is consistent with previous touches. In other words, you have been positioned as the professional, so it's important to respond as a professional. How would a professional contact the prospect, for example? Other noteworthy points:

- Do NOT call the leads yourself to arrange a time for an appointment, have your 'assistant' (or someone acting as your assistant) do it. Your time is valuable and your schedule is full. Plus, an assistant can build you up in a way that you can't do for yourself.

- Although appointment setting ratios have been consistently higher than 'traditional' lead programs, your assistant won't set appointments with everyone. Take the high road with those that decline to set an appointment with you. Again, a professional has many other clients that are waiting to see him/her and a 'soft sell' has proven to work well here.

- Keep the prospect on a mailing list or in a tickler file and follow up with them in a month. As you know, timing is a key element in any sales arena and circumstances change. A 'no' today often times is a 'yes' in as little as 30 days!

Treat these new prospects in the same manner you treat your existing clients and you WILL see success.

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Phone Waiver | DMCS

WE UNDERSTAND, THAT AT OUR REQUEST, THE DATA BEING PROVIDED TO US BY KNOWLEDGE-BASE MARKETING CONTAINS TELEPHONE NUMBERS WHICH HAVE NOT BEEN SCREENED AGAINST THE NATIONAL DO NOT CALL REGISTRY MAINTAINED BY THE FEDERAL TRADE COMMISSION AND VERY LIKELY CONTAIN TELEPHONE NUMBERS INCLUDED IN SUCH REGISTRY.

We represent, certify and warrant to KnowledgeBase Marketing that providing the telephone numbers to us and our use of the telephone numbers does not, and will not, violate the federal Telemarketing Sales Rule or any other applicable federal statue or regulation. We further represent that we are exempt from the federal Telemarketing Sales Rule for the reason(s) indicated below. If acting in the capacity of a Broker, we further represent and warrant that we are authorized to make these representations on behalf of our Client.

We agree to indemnify and hold KnowledgeBase Marketing harmless from and against any and all losses associated with any claim made by any third party arising out of (i) a breach of the warranties and representations made herein and/or (ii) any use of the provided information in violation of federal or state laws.

Please indicate which exemption applies:

Check one	Exempt Because:	Applicable Regulation
☐	We are an insurance company, subject to state regulation and are not subject to the jurisdiction of the Federal Trade Commission.	
☐	We are bank or other financial institution and are not subject to the jurisdiction of the Federal Trade Commission.	
☐	We have express, written agreements with the persons we will be contacting that authorize us to contact them by telephone.	16 CFR 310.4 (b1) (iii) (B) (i)
☐	We have an 'established business relationship' with each such person we will contact and such persons have not stated that they do not want to receive outbound telephone calls from us. An established business relation is understood to mean that either we have transacted business with the person within the preceding 18 months or the person made an inquiry or application to us within the preceding 3 months.	16 CFR 310.4 (b1) (iii) (B) (i)
☐	The requested data will be used only in connection with the solicitation of charitable contributions.	16 CFR 310.6(a)
☐	We are not a "Seller" and the requested data will be used only in connection with the conduct of political campaigns	16 CFR 310.2(z)
☐	We are not a "Seller" and the requested data will only be used in connection with the conduct of surveys.	16 CFR 310.2(z)
✓	None of the above apply but we are exempt because:	*We will only contact those who respond to mailing*

Company Name

Authorized Signature

Date

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Pricing | DMCS

Campaign Package = $1,790

- 2000 Direct Mail Cards w/ avg response of 2-3%
- Customized follow up letters sent to all respondents via First Class Mail w/enclosures
- Phone numbers provided for all respondents (where available)

One Time Set Up Fee = $250*

Grand Total = $2,040

Once payment has been received, you will be assigned a project manager to coordinate set up and execution of your drip campaign.

Visit the First Annuity Store for online payment options at www.firstannuity.net.

* The set up charge only occurs on the first campaign package.
Each additional campaign package will have a grand total of $1,790.

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