LET'S TALK FINANCIAL WELLNESS®

Let's Talk Financial Wellness® is a bimonthly cost-effective customer communications program to stay in touch and build relationships with your customers and prospects.
The program effectively promotes you and your financial partners as the trusted professionals.

45 Prospect Ave, Albany, NY 12206 | 1-800-243-5334 | letstalkfinancialwellness.com

LTM Client Marketing

Let’s Talk Financial Wellness®

Focuses on life insurance and financial services content. Multiple versions available.

*FINRA reviewed

Standard Financial: Easy to read content that provides insights into personal finances and investing for the individual.

Retirement Planning: Designed to help educate individuals and families about the importance of saving for retirement and being prepared.

Insurance/Legacy Planning: Insurance is fundamental in any holistic approach to financial and estate planning to keep their loved ones protected.

Small Business: Designed and written for business owners. Provides strategies to help owners maintain a competitive edge by using tools available through their trusted professionals.

High Net Worth: Designed and written for high net worth individuals with over $1M in assets.

Program Benefits:

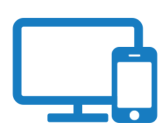
- More Content. More Flexibility.
- Targeted Direct Mail Campaigns, an automated solution with increased access to content.
- Staying in-touch, keeping you top of mind as the trusted professional.
- Increase brand awareness and messaging with multiple delivery formats.

Print and Email, Multi-Channel Effect!

- Increased brand awareness.
- Increased client engagement.
- Increased return on investment.
- Increased response rate translates into increased sales opportunities!

Print: Combine the personalized, four-page print newsletter with full mailing services.

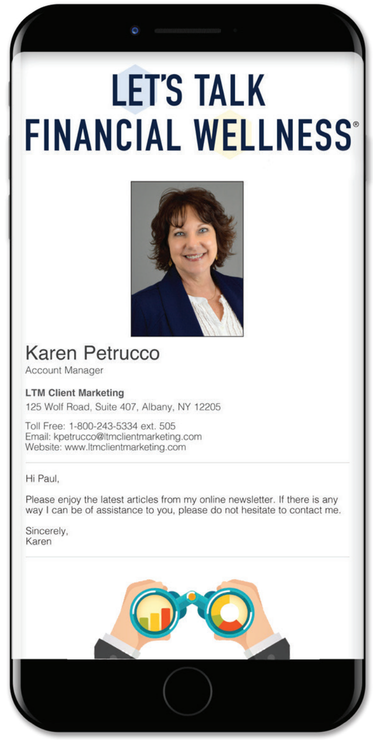
PDF: Distribute the personalized PDF to your customers and post it to your website.



Email: Your personalized mobile responsive email newsletters are sent to your customers for you, allowing your customers and prospects to view the content on any mobile device.

Let's Talk Financial Wellness® e-Newsletter

The Email Edition is a cost effective client touch point. Our turnkey program makes it easy for you, as we distribute your personalized email newsletter each issue, and maintain a personalized website of approved content.

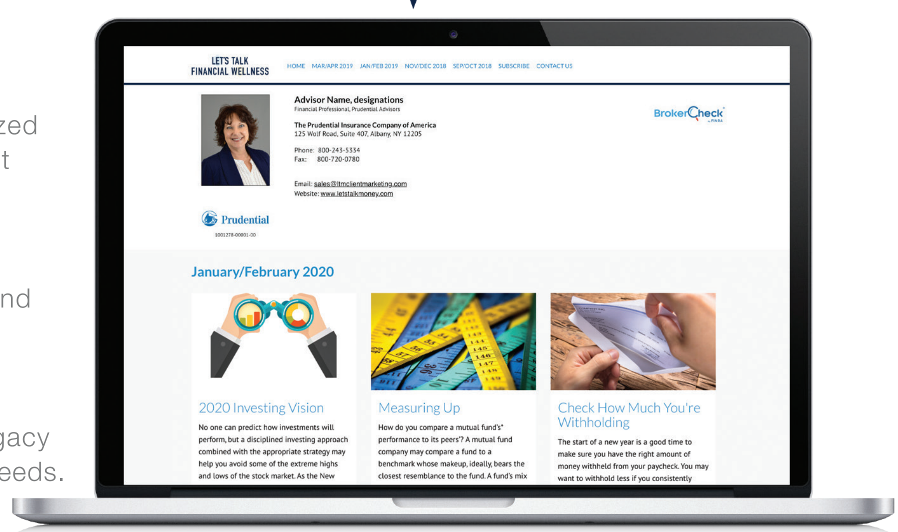


E-mail leads to your personal webpage.

Clients click on "Read More" to enjoy.

Turnkey Program Includes:

- Distribution of personalized email.
- Continuously updated content on personalized website that includes subscribe and contact page to promote client engagement.
- Real time analytics that capture opens, click-through, delivery success, opt-outs, and customer engagement.
- Content from all versions of the newsletter program; Standard Financial, Insurance/Legacy Planning, Retirement, and Small Business Needs.



ABOUT US

LTM Client Marketing develops, designs and executes a suite of highly customized and personalized communication solutions that help our customers create and support outstanding client experiences.

LTM Client Marketing specializes in crafting and distributing effective marketing and communication solutions for financial planning, insurance and accounting professionals.

We have decades of experience in financial services client marketing. Each member of our team ensures that the high-quality, custom products developed and distributed on behalf of our clients not only keeps clients top-of-mind, but propels them to excel in their strategic business objectives.

LTM Client Marketing focuses on highly-effective customized financial service newsletters, greeting cards, calendars, postcards and other targeted marketing products, from concept to compliance, and production to distribution.

State-of-the-art digital presses ensure that newsletters and printed marketing pieces reflect the specific content and professional image our clients covet. The option of distribution directly to USPS, or to clients for self-distribution, adds the final level of turnkey client convenience to our LTM Client Marketing print services.

LTM Client Marketing aligns our extensive financial services marketing experience to your professional aspirations, connecting you with your clients to reinforce and expand upon successful, profitable client relationships.

ANTHONY PENREE
Director
1-800-243-5334 ext. 500
apenree@ltmclientmarketing.com

KAREN PETRUCCO
Account Manager
1-800-243-5334 ext. 505
kpetrucco@ltmclientmarketing.com

ALISON BREW
Account Manager
1-800-243-5334 ext. 510
abrew@ltmclientmarketing.com