



Resources and services available to Financial Planners / Wealth Advisors to reach these targeted markets:

- Physicians
- Dental Professionals
- Business Owners
- Affluent Seniors
- Professional Women
- Affluent Individuals

Physicians

1) Email Campaign

Our group can leverage our database of physicians in your market (4,000 – 6,000 email addresses depending on the market) and develop and send a custom email template specifically for your business. Your email can include content, images, video uploads and live links to your email address and website (and any social media accounts). Average fee is usually around \$299.00.

2) MD Life Magazine



Our MD Life magazine is distributed monthly to doctors. The publication combines topical doctor and healthcare related stories with lifestyle articles such as travel, food, luxury and other content that is about an affluent lifestyle. You can place an ad, write an advice column or be interviewed for a profile article about you and your business. We publish individual editions for each of the 45 markets in the USA that we operate in so that you can target only the geographic areas that you want. We offer a new advertiser special program - \$99.00 for a full-page ad for one month.

3) Co-Op Postcard Campaign

Three times per year, our group produces a direct mail campaign to physicians with a co-op postcard stack. The group of individual postcards from different businesses is mailed to physicians at their office address. The postcards in the stack are from businesses and professionals who offer services and products to doctors. Each business participating in the co-op mailing has an exclusivity for their type of business. The average fee to participate is \$399.00.

4) Lunch Appointments

Our team will arrange lunch or in-person appointments between you and a physician that is interested in discussing their financial planning or retirement needs and who meet the qualifying criteria that you provide to us. The average fee per appointment set up for you is between \$79.00 and \$99.00.

5) Financial and Retirement Strategies Conference

Our group produces a quarterly conference for doctors which features speakers on topics such as financial planning, asset protection, retirement strategies, tax reduction, passive income and more related financial subjects. If you wish to participate in one of these conferences in your area the sponsor fee to be a featured speaker that also includes an exhibitor booth is \$599.00.

6) Physician Resources Guide

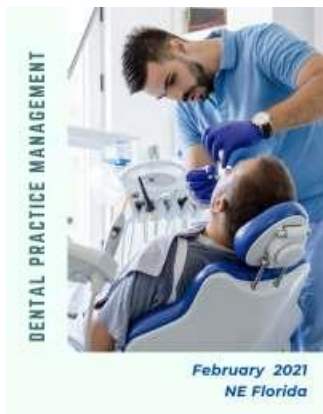
We publish and mail a resource directory for physicians that features businesses and professionals that serve the physician market. Each business that participates in the resource guide receives a two-page spread. One page is for editorial content such as an article or Q and A interview. The other side is a full-page advertisement. The typical fee for the two-page spread is between \$299.00 and \$399.00.

Dental Professionals

1) Email Campaign

Our group can leverage our database of dental professionals in your market (1,000 – 2,000 email addresses depending on the market) and develop and send a custom email template specifically for your business. Your email can include content, images, video uploads and live links to your email address and website (and any social media accounts). Average fee is usually around \$199.00.

2) Dental Practice Management Magazine



Our Dental Practice Monthly magazine is distributed monthly to dental professionals. The publication offers content related to operating a successful dental practice including management, financial and practice development related articles. You can place an ad, write an advice column or be interviewed for a profile article about you and your business. We publish individual editions for each of the 45 markets in the USA that we operate in so that you can target only the geographic areas that you want. We offer a new advertiser special program - \$99.00 for a full-page ad for one month.

3) Lunch Appointments

Our team will arrange lunch or in-person appointments between you and a dentist that is interested in discussing their financial planning or retirement needs and who meet the qualifying criteria that you provide to us. The average fee per appointment set up for you is between \$79.00 and \$99.00.

4) Financial and Retirement Strategies Conference

Our group produces a quarterly conference for dental professionals which features speakers on topics such as financial planning, asset protection, retirement strategies, tax reduction, passive income and more related financial subjects. If you wish to participate in one of these conferences in your area the sponsor fee to be a featured speaker that also includes an exhibitor booth is \$599.00.

Business Owners

1) Email Campaign

Our group can leverage our database of business owners in your market (8,000 – 10,000 email addresses depending on the market) and develop and send a custom email template specifically for your business. Your email can include content, images, video uploads and live links to your email address and website (and any social media accounts). We can also filter this list to only target medium and large sized businesses or businesses with typical owner pre-tax annual income for further targeted emailing. Average fee is usually around \$399.00.

2) Business Strategies Magazine



Our Business Strategies magazine is distributed monthly to business owners. The publication includes articles on all aspects of running a successful business and strategic business insight as well as lifestyle content that is related to the unique lifestyle a business owner has versus someone working a 9-5 job. You can place an ad, write an advice column or be interviewed for a profile article about you and your business. We publish individual editions for each of the 45 markets in the USA that we operate in so that

you can target only the geographic areas that you want. We offer a new advertiser special program - \$99.00 for a full-page ad for one month.

3) Minority Business Owner Magazine

We are pleased to announce a new publication named Minority Business Owner. Operating a business as a minority owner has unique circumstances and challenges that other business owners do not necessarily face. This publication will have content that addresses these issues in addition to our content and advice on running a successful business. Please ask us for details about placing an ad or editorial content in your market.

4) Co-Op Postcard Campaign

Three times per year, our group produces a direct mail campaign to business owners with a co-op postcard stack. The group of individual postcards from different businesses is mailed to business owners at their locations. The postcards in the stack are from businesses and professionals who offer services and products to businesses. Each business participating in the co-op mailing has an exclusivity for their type of business. The average fee to participate ranges between \$399.00 and \$499.00.

5) Lunch Appointments

Our team will arrange lunch or in-person appointments between you and a business owner that is interested in discussing their financial planning , retirement strategies, insurance needs, 401K plans or other services that you offer and who meet the qualifying criteria that you provide to us. The average fee per appointment set up for you is between \$79.00 and \$99.00.

6) Business Owner Exit Strategy and Retirement Planning Conference

Our group produces a quarterly conference for medium to large sized business owners and high-income professional services owners that are planning to sell their business, transition from it and/or planning to retire. We feature speakers that address making financial decisions and planning to create best financial outcomes, reducing tax liabilities, creating future income streams, setting up the proper plan for this next phase and other related topics that are relevant to this period of a business owner's life. If you wish to participate in one of these conferences in your area the sponsor fee to be a featured speaker that also includes an exhibitor booth is \$599.00.

7) Business Owner Resources Guide

We publish and mail a resource directory for business owners that features businesses and professionals that serve the business market. Each business that participates in the resource guide receives a two-page spread. One page is for editorial content such as an article or Q and A interview. The other side is a full-page advertisement. The typical fee for the two-page spread is between \$399.00 and \$499.00.

Affluent Seniors

1) Co-Op Postcard Campaign

Three times per year, our group produces a direct mail campaign to affluent senior households with a co-op postcard stack. The group of individual postcards from different businesses is mailed to affluent

senior households. The postcards in the stack are from businesses and professionals who offer services and products to seniors. Each business participating in the co-op mailing has an exclusivity for their type of business. The average fee to participate is \$399.00.

2) Senior Lifestyles Magazine



This monthly magazine is targeted to affluent seniors and includes topical editorial content on lifestyle, health and financial subjects. We publish individual editions for each of the 45 markets in the USA that we operate in so that you can target only the geographic areas that you want. We offer a new advertiser special program - \$199.00 for a full-page ad for one month.

3) Financial and Retirement Strategies Conference

Our group produces a quarterly conference targeted to seniors with at least \$700,000 in assets. It features speakers on topics such as financial planning, asset protection, retirement strategies, tax reduction, passive income and more related financial subjects. If you wish to participate in one of these conferences in your area the sponsor fee to be a featured speaker that also includes an exhibitor booth is \$599.00.

4) Seniors Resource Guide

We publish and mail a resource directory for affluent seniors that features businesses and professionals that serve this market. Each business that participates in the resource guide receives a two-page spread. One page is for editorial content such as an article or Q and A interview. The other side is a full-page advertisement. The typical fee for the two-page spread is between \$299.00 and \$399.00.

5) On-Line Senior Education Presentations

This is a new program that enables you to go where the seniors are at – in their homes. You can sign up to be available for questions and discussion or you can make a presentation to seniors and their families via a Zoom session. They can follow-up with a request for a private appointments. You can have four sessions per month scheduled for three months – twelve sessions in total for only \$399.00 as the only business presenting sessions in your category during that period of time.

Professional Women

Our professional women market targets include high income categories such as CPA, attorney, physician, dentists, architects, corporate managers and other women professionals who typically have an income that is above \$100,000 annually.

1} Email Campaign

Our group can leverage our database of professional women in your market (6,000 – 8,000 email addresses depending on the market) and develop and send a custom email template specifically for your business. Your email can include content, images, video uploads and live links to your email address and website (and any social media accounts). Average fee is usually around \$299.00- \$399.00) .

2) Professional Women Magazine



Our magazine is distributed monthly to professional women. The publication combines topical professional workplace related content with lifestyle articles such as travel, food, luxury and other content that is about an affluent lifestyle. You can place an ad, write an advice column or be interviewed for a profile article about you and your business. We publish individual editions for each of the 45 markets in the USA that we operate in so that you can target only the geographic areas that you want. We offer a new advertiser special program - \$99.00 for a full-page ad for one month.

3) Co-Op Postcard Campaign

Three times per year, our group produces a direct mail campaign to professional women with a co-op postcard stack. The group of individual postcards from different businesses is mailed to professional women at their office address. The postcards in the stack are from businesses and professionals who offer services and products to this target market. Each business participating in the co-op mailing has an exclusivity for their type of business. The average fee to participate is \$399.00.

4) Lunch Appointments

Our team will arrange lunch or in-person appointments between you and a professional woman prospect that is interested in discussing their financial planning or retirement needs and who meet the qualifying criteria that you provide to us. The average fee per appointment set up for you is between \$79.00 and \$99.00.

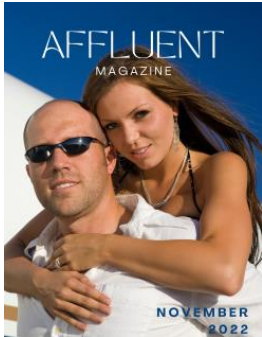
5) Financial and Retirement Strategies Conference for Professional Women

Our group produces a quarterly conference for high income women professionals which features speakers on topics such as financial planning, asset protection, retirement strategies, tax reduction, passive income and more related financial subjects. If you wish to participate in one of these conferences in your area the sponsor fee to be a featured speaker that also includes an exhibitor booth is \$599.00.

Affluent Individuals

We determine an affluent prospect in our markets by the value of the property that they own. For each of our markets, our database is built from people residing in the highest valued property and then descending down in property value for a target base of 10,000 homes in that market.

1) Affluent Lifestyles Magazine



Our Affluent Lifestyle magazine is distributed monthly to 10,000 affluent households. The publication features articles related to living an affluent life such as food and wine, travel, luxury goods, fashion, design, finances and other related topics. You can place an ad, write an advice column or be interviewed for a profile article about you and your business. We publish individual editions for each of the 45 markets in the USA that we operate in so that you can target only the geographic areas that you want. We offer a new advertiser special program - \$249.00 for a full-page ad for one month.

2) Co-Op Postcard Campaign

Three times per year, our group produces a direct mail campaign to affluent homeowners with a co-op postcard stack. The postcards in the stack are from businesses and professionals who offer services and products to this targeted affluent group. Each business participating in the co-op mailing has an exclusivity for their type of business. The average fee to participate is \$399.00.

3) Financial and Retirement Strategies Conference for Affluent Individuals

Our group produces a quarterly conference for affluent and wealthy individuals. The conference features speakers on topics such as financial planning, asset protection, retirement strategies, tax reduction, passive income and more related financial subjects. If you wish to participate in one of these conferences in your area the sponsor fee to be a featured speaker that also includes an exhibitor booth is \$599.00.

General Services for You

Our group offers individual services for financial planning professionals to assist them in generating new clients.

1) We Can Create Your Marketing Materials

Our team can create flyers, brochures, post cards, signs, email templates, ads, graphics for social media and more. We also offer full-service printing.

2) Email Campaigns

We can create an effective email communication for you to send to your prospects and/or existing clients. We can also create a prospect database and send your custom email to these new prospects.

3) Direct Mail

Our group offers complete direct mail services from creating your piece, securing the mailing list, printing, bundling and mailing.

4) Custom Newsletters or In-House Publications

Use newsletters or publications to engage and educate your current base or utilize these as a marketing tool to generate new business. Our company publishes our own newsletters and publications in 45 markets in the United States and we are available to offer our turn-key publishing services to you, from content to final publication in digital or print format.

5) Podcast Production

Do you want to have your own podcast? We can help you develop content and scripts, train you on how to do it, provide the software and equipment, get it listed for download on the proper apps, produce it and even promote it and sell advertising for you.

6) Seminar Production and Promotion

Our group can develop a seminar program for you to make presentations and we can assist you with marketing your seminars to your target market.

7) YouTube Channel Production

Do you want to have your own YouTube Channel? We can help you develop the format, produce your episodes and then promote the channel and help you build audience and subscriptions to your programming.

Contact Us

Please email us at clientservices@rjwcommunications.com or call us at 888-670-2228 for further information on how any of our services can help you connect to your market.