

**AMPLIFIED ADVISORS BROCHURE**

# Services & Offerings

CLIENT ACQUISITION SYSTEMS  
FOR ADVISORS



**Amplified Advisors**



# Introduction

Amplified Advisors specializes in connecting financial advisors with high-quality prospects through a combination of educational materials, non-investment advice, and personalized appointment setting services. Our mission is to streamline the client acquisition process for financial advisors, allowing them to focus on providing top-tier advisory services.

## Service Overview

At the heart of our offering is a unique approach to lead generation and appointment setting. We produce engaging educational content tailored to the interests and needs of potential financial advisory clients. This content, while not offering investment advice, provides valuable insights into financial planning, retirement preparation, and wealth management, positioning our advisor clients as trusted experts in their field.

## Methodology

Our unique approach, "Digital Engagement Methodology," mirrors traditional advisory prospecting methods, transitioning them into the digital space for scalability and efficiency. This includes:

1. **Analytical Testing:** Regular analysis and optimization of marketing funnels and advertisements to maintain high conversion rates and prevent ad fatigue.
2. **Content Development:** Creation of value-driven, educational content (NOT INVESTMENT ADVICE) tailored to the financial advisory industry, fostering trust and authority.
3. **Lead Nurturing:** Implementation of strategic communication workflows to engage and convert prospects through personalized interactions.

## Process

1. **Content Creation:**
  - We develop a range of educational materials, including articles, eBooks, and webinars, designed to address the common questions and concerns of pre-retirees and retirees.
  - This content is carefully crafted to be informative and engaging, encouraging readers to learn more about managing their finances effectively (NOT INVESTMENT ADVICE).
2. **Lead Generation:**
  - Interested individuals provide their contact information in exchange for access to our educational resources.
  - This exchange not only offers value to potential clients but also creates a pool of leads who have demonstrated a clear interest in financial planning and advisory services.
3. **Appointment Setting:**
  - Our team of professional appointment setters takes the lead from here. They reach out to the prospects, leveraging the initial contact made through the educational materials to open a conversation.
  - Through a personalized approach, our team schedules discovery calls or meetings between the prospects and our advisor clients, ensuring a seamless transition from potential lead to engaged prospect.





## Benefits

1. **Quality Leads:** Our method ensures that the leads generated are genuinely interested in financial advisory services, having already engaged with relevant content.
2. **Efficiency:** By automating the initial stages of lead generation and employing skilled appointment setters, we save our advisor clients significant time and effort, allowing them to concentrate on their core services.
3. **Scalability:** This model is designed to be scalable, enabling advisors to consistently grow their client base without the need for direct involvement in the lead generation process.

## Revenue Model

Amplified Advisors generates revenue through a transparent pricing model based on the services provided. This includes a retainer-based model that is a management fee for the campaign, while advisors are responsible for providing direct advertisement spend.

## Compliance and Regulatory Standards

Amplified Advisors strictly adheres to SEC regulations and industry standards, ensuring all marketing materials and client communications are compliant, transparent, and ethical. Our compliance framework includes:

- **Content Review and Approval:** All marketing content is rigorously reviewed for compliance with financial regulations before publication.
- **Data Privacy and Security:** Robust measures are in place to protect client data and privacy, in line with SEC regulations and GDPR.
- **Continuous Monitoring:** Ongoing monitoring of regulatory changes to ensure our strategies and services remain compliant.

## Conclusion

At Amplified Advisors, we are committed to providing financial advisors with the tools and strategies needed to grow their practices in a scalable, efficient, and compliant manner. Our dedicated team of experts is continually innovating to stay ahead of industry trends and regulatory requirements.





## Amplified Advisors: Important Disclosure

Amplified Advisors is committed to transparency and integrity in all of our business practices. Please note the following important points regarding our services:

1. **Educational and Informational Material:** Our services are focused on providing educational and non-investment advice materials to individuals interested in financial planning and advisory services. These materials are designed for informational purposes only and do not constitute financial, legal, or investment advice.
2. **Appointment Booking Services:** We facilitate connections between interested individuals and certified, registered financial advisors by providing booked appointments. These appointments are intended for initial discovery calls to explore potential advisory services. We do not guarantee the quality, suitability, or outcomes of any advisory services that may follow these initial appointments.
3. **No Investment Advice:** Amplified Advisors does not offer investment advice, manage investment portfolios, or engage in financial planning services. Our role is solely to assist in the introductory process between individuals seeking financial guidance and professional advisors.
4. **No Guarantees of Results:** Working with advisors in our network does not guarantee any specific financial outcomes or results. Financial advisory services are subject to a wide range of market risks and personal financial situations that we do not control or assume responsibility for.
5. **Advisor Network:** The financial advisors within our network are independent professionals who are responsible for their own compliance with all applicable laws and regulations, including those set forth by the SEC and other regulatory bodies. Amplified Advisors does not endorse or guarantee the services provided by any individual advisor in our network.

By engaging with Amplified Advisors' services, you acknowledge and agree to the terms outlined in this disclosure. We encourage all potential clients to perform their own due diligence and consult with a qualified financial advisor before making any financial decisions.



# Amplified Advisors

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